Working with Stories

Simplified

PARTICIPATORY NARRATIVE INQUIRY IN BRIEF

Cynthia F. Kurtz

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Participatory Narrative Inquiry in Brief

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Chapter 1

Introduction

This book is an introduction to Participatory Narrative Inquiry (PNI). You can use it to get started with PNI, and you can use it as a quick reference.

What is PNI?

Participatory Narrative Inquiry is a form of Participatory Action Research in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making.

PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

A PNI project can range from three people talking in a room for an hour to thousands of people talking for a decade. All across this range, PNI is powered by people who gather together through and around their stories.

There are three essential phases in every PNI project:

1. In the Collection phase, stories are gathered together.
2. In the Sensemaking phase, people work with the stories, comparing them, combining them, talking about them, learning from them.
3. In the Return phase, the stories go back—and the story of the project goes back—into the team, family, community, or organization.

For more information on PNI, see the other books in this series.

- *Working with Stories in Your Community or Organization* is the fourth edition of my original 2008 textbook on PNI. It covers the same concepts and techniques as this book, but in much more detail.
- *The Working with Stories Sourcebook* provides 50 question sets for use in your PNI projects, plus 50 brief descriptions of real-life PNI projects.
- *The Working with Stories Miscellany* is a collection of essays and other writings about the theory and practice of PNI.

Why Work with Stories?

When I first talk to people about working with stories, the most common question they ask is: "Why work with stories?"

I have come to understand that this question is actually three different questions:

1. Why work with *stories?* Why not just gather facts and opinions?
2. Why *work with* stories? What do you mean by that? Don't we already tell stories?
3. *Why* work with stories? What can we get out of it? What can it do for us?

To each of these questions I have a different answer.

Why not just gather facts and opinions?

What is it about stories that makes them useful in ways that facts and opinions are not? I can think of eight things.

- **Sharing stories is an ancient social ritual**. When people are talking and a story comes up, the conversation undergoes a subtle shift in tone, signaling a transition to a ritualized interaction, a negotiated agreement to hold the floor and speak freely (within limits). The ritual of story sharing is ancient and universal. When you ask someone to share a story with you, you initiate this ritual, and you agree to give them your time, attention, and respect. This helps them say things they could not say without such an agreement in place.
- **Stories draw us in**. Every story conforms to the same fundamental shape. A context is introduced; a tension develops; the tension is resolved. This wait-and-see structure attracts our problem-solving brains like moths to a flame, and it helps us to maintain the effort required to fully explore the story, whether we are hearing it or telling it. Like the arc of a rainbow, the arc of a story engages our attention.
- **A story is a social safety pin**. Telling a story is a safer way to do a dangerous thing. The forms and rituals of storytelling are like the protective guards on a safety pin. Telling a story isn't completely safe, but it's safer than complete candor.
- **Story listening shows respect**. We are all used to being asked for our opinions in standard surveys, and we all know how to put on our poker faces for that game. Sharing stories is a different game, one with greater respect and freedom, and it can help people tap into hidden sources of energy to work toward a common goal.
- **Stories tell us what we don't know we know**. Our memories hold many insights, but they are not always easy to get at. When we tell stories, we can reveal feelings and beliefs of which we ourselves are not aware.
- **Stories help us to see the world anew**. When we listen to a story, we experience a suspension of disbelief and a displacement of perspective that helps us to see things through new eyes. Groups of people who experience each other's stories can achieve deeper insights than they can by considering opinions and facts.
- **Stories bring our imaginations together**. Asking a diverse range of people what they have done and seen—and what they would and would not like to do and see in the future—brings their imaginations to bear in a synergistic explosion of creativity.

- **Stories create networks of meaning**.Asking people to talk about their experiences can lead to useful answers even if you ask the wrong questions, because the contextual richness of stories provides information in excess of what was directly sought. In fact, being surprised by the questions answered (and posed) by collected stories is a frequent event in Participatory Narrative Inquiry.

What is "working with" stories? Don't we already tell stories?

Why pay conscious attention to stories? Isn't this a natural process? Why attempt to shape it? Won't you just impose order on something that ought to take natural shape?

Yes, people telling each other stories in unstructured, everyday conversation is a constant human activity. It seems people cannot talk without telling stories, at least some of the time. However, we tell stories in daily life far less than we used to.

- In pre-industrial times, story sharing was strong, habitual, and useful, a valuable asset of every community. Travel was slow and rare; connections were multiplex and long-term; and narrative continuity was high. Also, people spent a lot of time doing tedious but quiet activities that lent themselves to story sharing, like farming, fishing, spinning, weaving, and processing food.
- The changes brought about by the industrial age caused story sharing to grow weakened, fragmented, and disrespected. Travel became fast and frequent; connections were broken; and narrative continuity decreased. Labor-saving devices made it unnecessary to spend time together doing quiet boring work. Commercial storytelling arose to fill the gap, and we learned how to be good audiences.
- The post-modern age has ushered in a partial revival of everyday storytelling. Mobility remains high, but the internet has increased both connection and narrative continuity. The revival of crafting and DIY hobbies has created new social contexts for casual story sharing. And the barrier between storytellers and audiences has gotten more complex.

In short, we are beginning to reskill ourselves in story exchange, and Participatory Narrative Inquiry is part of that revival.

What can we get out of using PNI? What can it do for us?

The *why* part of the question "Why work with stories?" has to do with return on investment. People want to know what *results* they can get from working with their stories.

The following table lists some of the things you can do with PNI.

If you want to	You can	For example
Find things out	Address a specific question by looking at patterns across experiences and reflections	A hospital might examine its policies by asking its patients about their interactions with caregivers
Catch emerging trends	Pick up on growing problems and opportunities by asking people what has been happening to them lately	A non-profit organization might ask its volunteers about the high and low points of their volunteering each month
Make better decisions	Compare options by exploring relevant experiences from all perspectives	A town might compare three future scenarios, drawing from stories of the community in the present and past
Find new ideas	Address a longstanding problem with collective imagination	A community might ask its members to recall times when they saw tense confrontations defused with compassion
Reduce conflicts	Help people understand the experiences and perspectives of people in other groups	A community might explore diverse stories of everyday life to find common ground
Build connections	Help community members communicate norms and negotiate changes	A university might ask some of its students to build a story-filled orientation handbook for new students
Help people learn	Improve collective productivity with real-life stories of learning and insight	An organization might build a help system that gathers stories from software users to diagnose problems and find solutions
Enlighten people	Find authentic experiences to highlight and challenge limiting assumptions	An advocacy group might gather, then explore, then communicate stories of lived experience with their topic

What you can't do

So what *can't* you do with PNI? You can't *prove* anything. You can't find specific answers, test hypotheses, or conduct experiments as you would in a scientific endeavor. Working stories is a blunt instrument. You can come up with hypotheses, but you can't control how people will interpret the questions you ask them, so you can never be sure if those hypotheses were proven or disproven. You can't create a control group, because you can't control how people will react.

Is this a problem? I don't think so. I have come to believe that when your subject is human beings and the things they feel and believe, proof isn't a very useful thing. What is useful is *help* coming to decisions. For that purpose, working with stories has an excellent record of accomplishment.

The other thing you can't do when you work with stories is *lie*. If you try to use the stories people tell you to create propaganda that distorts what they said (though not all propaganda does), chances are the truth will come out. And when it does, nobody will ever want to tell you stories again. So you can't really *use* stories; you can just *work with* them.

Why not just exchange stories?

Helping people share stories sounds great. But, you may be asking, why do more than that? Why help people "work with" their stories? Isn't story sharing enough?

It might be. If you are not interested in helping your community or organization solve pressing problems or find better solutions, helping people to simply share more stories may be enough. But if your goals are more ambitious, you can achieve more by helping people work with their stories. For example, I have seen people use PNI to:

- discover insights that had been eluding them for years
- see each other as they really were for the first time
- overturn assumptions that stood in the way of needed solutions
- release unhoped-for fountains of energy to build a better future

All of these things happened because people did more with their stories than just telling and listening to them. Based on my experiences in this area, I believe that if you could run an experiment in which community A simply shares stories while community B both shares stories and works with their stories to build things together, community B will arrive at better, more robust, more resilient, more *grounded* decisions.

But don't take my word for it! Try it yourself and see if it works for you. Or better, *make it work* for your community or organization. If you start small and work your way into greater understanding of the techniques I describe in this book, I am confident that they will be useful to you.

How to use this book

Don't just read it. Do it. Many of the things I explain in this book are hard to explain in words. My suggestion is to read a bit, go out and try what you read, then come back and read some more. Keep doing this until you don't need the book anymore. Then write your own book. Seriously. Everyone has their own unique way of doing this work. Find yours.

Chapter 2

Story Fundamentals

This chapter sets you up with some basic knowledge you need to work with stories.

What is a story?

You may have noticed that when people say the word “story,” they mean a variety of things. So what does the word actually mean?

A group of blind travelers encountered an elephant.

One traveler felt the elephant’s trunk and said, “Watch out! It’s a snake!”

Another felt the elephant’s leg and said, “You’re wrong. It’s a tree.”

A third felt the side of the elephant and said, “You’re both wrong. It’s a boulder!”

That’s how it is with stories. What they are depends on how you look at them, and how you look at them depends on who you are. (That story, by the way, is over 2000 years old.)

We can organize the many meanings of the word “story” into three primary perspectives.

A story is a message

We tell stories to express ourselves and to influence and entertain others. From this perspective, the best stories reach out and touch their audiences. When we think about stories from this perspective, we think about how stories deliver their messages through carefully crafted settings, characters, and plots.

A story is a thinking tool

We tell stories to remember, learn, teach, and imagine. From this perspective, the best stories help us make sense of our lives. When we think about stories from this perspective, we think about how stories help us think through situations, explore possibilities, experiment with ideas, and decide what to do next.

A story is a connection

We tell stories to build relationships. From this perspective, the best stories help us see through each other's eyes. When we think about stories from this perspective, we think about how stories flow through families, groups, communities, organizations, and societies.

Every definition of "story" is a story

What you think the word "story" means says as much about you as it says about stories.

Here's an exercise for you. How do you think each of these authors was thinking about stories when they wrote these quotes?

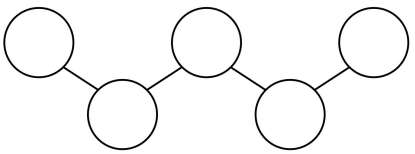
> "[Story] structure is a selection of events . . . composed into a strategic sequence to arouse specific emotions and to express a specific view of life." — Robert McKee, screenwriter
>
> "[T]he symbolic forms we call folklore have their primary existence in the action of people and their roots in social and cultural life." — Richard Bauman, anthropologist
>
> "When a prior experience is indexed cleverly, we can call it to mind to help us understand a current situation." — Roger Schank, cognitive scientist

If somebody asked you to define the word "story," what would you say? Which perspective on stories seems the most useful or interesting to you?

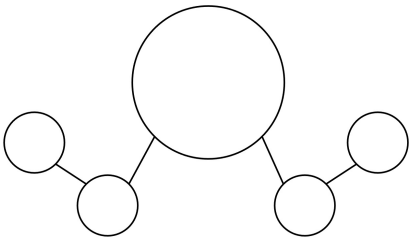
Most people gravitate towards one or two of these perspectives, but in reality, stories are all of these things. Stories help us to communicate, think, and connect. When we can look at a story from all three perspectives, we can explore it from every angle. We can think about why it was told, what it means, what it can teach us, and where it needs to go.

Stories and conversations

Everyday conversation has a tick-tock turn-taking rhythm. Nice people try to keep things fair and equal.



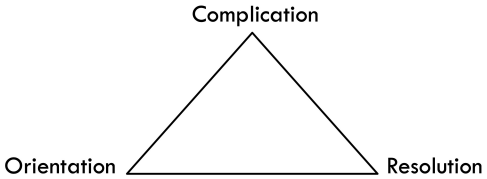
When someone tells a story, they hold the floor for a longer period of time than usual.



Holding the floor is both a privilege (everyone is listening to you) and a danger (they might not like what you say). In social situations, where privilege meets danger, you find ritual. If you want to help people tell stories, to you and to each other, it helps to understand the ritual.

The shape of a conversational story

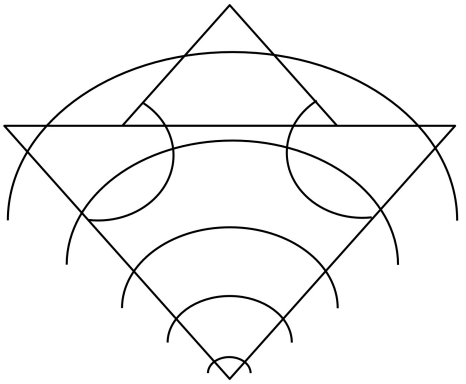
A story told in conversation is like an iceberg. What you can see above the surface looks like any story you read in a book or see in a movie.



- Every story begins with an *orientation* in which the storyteller sets up the story's context. We are told when, where, and to whom the story happened, and we are given some basic ground rules, like whether animals can talk.
- The *complication* begins when the story's protagonist—the person to whom the story happened—encounters a challenge (or dilemma or opportunity). How will the protagonist respond? And what will happen when they do? These questions keep our attention as the events of the story play out.
- Finally, the story ends with a *resolution*, a final outcome that releases the tension between possibilities that gave the story its energy.

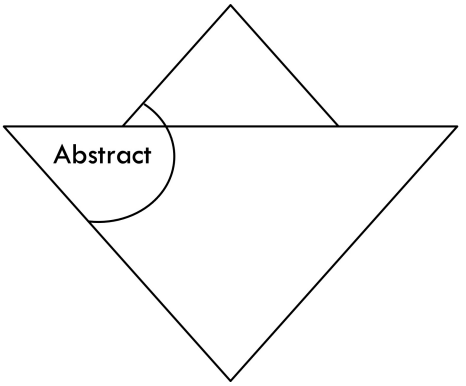
If you think about your favorite books and movies, you can see how this orientation-complication-resolution model plays out in them.

Now let's dive beneath the surface. When a story is told in conversation, the story that is being told lies nested within another story: the story of the story's telling. That larger story is a story of social negotiation. Waves of negotiation ripple up into the story being told and out from the storytelling into the conversation, into the relationships among the people who are talking, and into the culture in which they live.



The abstract

Every conversational story starts with an *abstract*, a request to hold the floor long enough to tell a story. Story abstracts are ritualized ways of saying, "I would like to tell you a story. May I?"



Some typical abstracts are:

- Offers, such as:
  - "Would you like to hear how I won this trophy?"
  - "Did I ever tell you about the time I… "
  - "I've had some experience with that. Want to hear about it?"
- Formulaic story starters, like:
  - "Once upon a time…"
  - "I can tell you a tale about…"
  - "That reminds me of the time…"
- Past-tense references to moments, events, people, places, or objects, like:
  - "Back when I was in high school…"
  - "That park wasn't always a park, you know…"
  - "My uncle was a character, I'll tell you…"
  - "I got this guitar back in 64 at the…"

If you watch people in conversation, you can see them putting out story abstracts from time to time. Often someone will throw an abstract into the conversation, then pause for a moment while they look around to gauge the reactions they are getting.

Once it is offered, a story abstract can be:

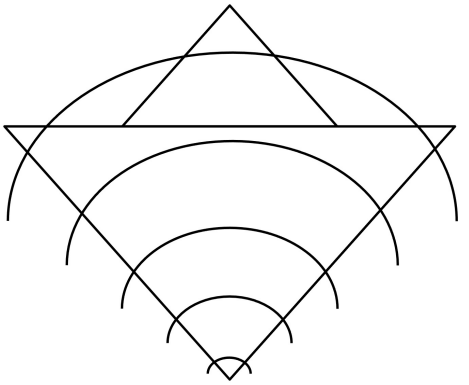
- Accepted as presented — "Sure, go ahead." (Or a nod or look.)
- Accepted with conditions based on things like:
  - Safety — "I'm sure ___ doesn't want to hear about our ___." (Meaning: You can tell the story if you tell the safe-in-front-of-strangers version.)
  - Telling rights — "I was there too! We all got the same trophy." (Meaning: You can tell the story if I get to tell it with you, because I have as much right to tell it as you do.)
  - Relevance — "We're talking about football. Is this about football?" (Meaning: You can tell the story if you keep it on topic.)
  - Distrust — "Is this about ___ again?" (Meaning: You can tell the story if it's not the same story you keep telling us to persuade us of the same thing.)
- Rejected — "You told us about that last week." (Meaning: No. Stop.)
- Ignored — "What are we having for lunch?" (Meaning: A few possible things. It could be a rejection, but it could also mean that the abstract was too vague to be understood as a request to tell a story.)

After the reaction, the person who offered the abstract will sometimes change the abstract and try again with a different emphasis. They may offer to reframe the story by:

- Adjusting the story to conform to the audience's conditions — "I was on the team—yeah, okay, we were *both* on the team." (Meaning: I recognize your telling rights, and I will share the telling of the story with you.)
- Making a pitch for the story's value — "It really says a lot to me about perseverance, you know?" (Meaning: Despite your misgivings, you will be glad you listened to this story.)
- Appealing to authority — "Joe said I should tell you about this." (Meaning: People in power want you to listen to me.)
- Telling the story in miniature — "It's about a time when it looked like we were going to lose, but instead we won." (Meaning: Here's what you'll be missing out on if you don't listen.)

Evaluation statements

Once the abstract has been offered and accepted, the storyteller can finally begin to tell the story. But as they do this, they keep up a running commentary of *evaluation statements*: things they say about the story that didn't happen in the story itself. The meaning of every evaluation statement is the same: this story is worth hearing, so you should keep listening.



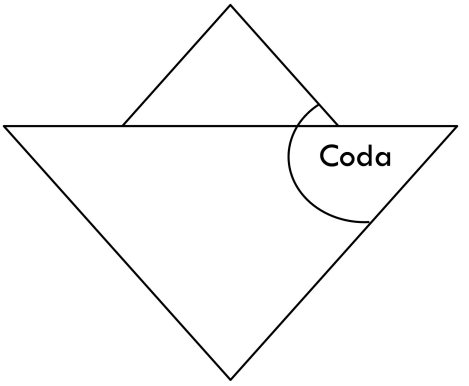
Some common examples of evaluation statements are:

- Repetitions — "It was *two hundred*, I'm telling you, *two hundred*!"
- Emphases — "I've *never* seen anything like that before."
- Appeals to authority — "Coach said he'd never seen anything like it."
- Reported speech — "He was like (doing a voice), '*Damn*, that's good.' "
- Requests for support — "Have you ever seen anything like that?"

In general, the more confident and secure we feel as we tell a story, and the more satisfying of a response we get, the fewer evaluation statements we add to it.

The coda

The coda of a conversational story sums up the story and—once again—justifies its telling. Why do we try to prove that our story was worth listening to even after it is over? Because we might want to tell another story sometime.



Some common elements of story codas are:

- Formulaic conclusions — "And that's all she wrote!"
- Lessons or morals — "And that just goes to show you, don't ever give up."

- The whole story again in miniature — "And so we won! Even though we started out so badly." (I do this one a lot.)
- Appeals to authority — "I told my dad about it, and he was like, 'That's *amazing*.' "
- Requests for support — "What do you think of that?"

Why all the ritual?

The ritual of story sharing, a carefully negotiated dance of connection that we all learn in childhood, exists to resolve the tension between revealing ourselves—our feelings, values, and beliefs—-and protecting ourselves from ridicule.

The story-sharing ritual resembles another ritual of social negotiation: the exchange of gifts. We wrap gifts in paper, and we wrap stories in offers and requests.

The custom of shaking hands is another similar ritual, one that is also thousands of years old. You can't hold a weapon in a hand you extend, so offering to shake hands is both an offer and a request. The proper response is to extend the same hand, signaling a temporary mutual acceptance of vulnerability in order to connect.

Similarly, in a conversation, when someone offers a story abstract and another person or group accepts it, storyteller and audience agree to a temporary mutual acceptance of vulnerability in order to connect.

All of these social rituals—telling a story, giving a gift, shaking hands—are strongly influenced by the context in which they take place. This is why no two instances of these rituals are the same, even when people tell the same stories, give the same gifts, or shake the same hands.

More layers of ritual

Story sharing is similar to gift-giving in several other ways:

- Response stories, told in response to other stories, can build up into long chains of connected stories. These are like reciprocal gift exchanges.
- Co-told stories strengthen connections among co-tellers even more than story chains do, because co-tellers build the story together. Telling a story together is like what happens when two people "go together" on a gift to a third person.
- Counter-stories, told in contrast to other stories, negotiate and reinforce cultural norms. They also challenge limiting assumptions and break up rigid dogmas. Some gifts are similarly corrective, especially if they enter into reciprocal gift exchanges after an inappropriate gift has been given.
- A retelling is what happens when when one person tells another person's story to a third person. Retelling stories is like what happens when one person passes on part of a large gift (maybe one of food) to someone else. People usually only do this with the permission (explicit or implied) of the original gift giver.
- Mistake stories are a particularly vulnerable form of story sharing that requires more trust all around. These stories are like home-made gifts. To give them, a giver must be assured of their acceptance and appreciation despite their flaws.
- Tall tales are the stories everyone knows but doesn't take literally. For example, in a family, the story of how the eldest child said something spectacularly precocious at a

tender age might be told and retold many times, even though everyone knows it strays a bit from literal truth.

- Sacred stories are the stories everyone knows. They are unique to the group, unknown outside of it, frequently referenced, and rarely told. Sacred stories are like gifts that serve as proof of group membership. For example, a grandparent might give all of their descendants the same framed photograph, which everyone displays proudly.

Storywatching

Learning about story sharing is like learning about birds. Every birdwatcher goes from hearing a bird and thinking "bird" to hearing a bird and thinking "hermit thrush." In the same way, every storywatcher goes from hearing a conversation and thinking "they're talking" to hearing a conversation and thinking "the abstract was accepted as reframed." The more you listen, the more you will learn.

Stories and social groups

Why *do* people share stories in teams, families, communities, and organizations? What role does story sharing play in these groups?

- In the short term, in everyday life,
  - People share stories to maintain their social contract through perpetual renegotiation, preserving the boundary between what is acceptable and what is unacceptable.
  - People share stories to meet their daily challenges and solve their daily problems.
- In the long term, over time,
  - People share stories to maintain their shared identity, preserving the boundary between what is inside and outside the community.
  - People share stories to play with possibility, combining their imaginations to help the community adapt to changing conditions.

Healthy and unhealthy story sharing

In healthy story-sharing cultures, everyone enjoys the right to speak freely, and everyone is expected to respect the feelings of others. In unhealthy story-sharing cultures, only some people enjoy the right to speak freely, and only some feelings are respected.

The paradox of story sharing

It is a mistake to believe that story sharing is always a good thing. In fact, for every positive thing you can say about story sharing, the opposite is also true.

Stories can	And stories can
tell the truth	lie
harm	help
connect	divide
mislead	enlighten
reveal	conceal

Stories are like fire, which warms and burns. Working with stories, like working with fire, requires that we pay attention to both sides of the picture. So if you want to help a community or organization share stories, don't just help them share stories. Help them build a healthy story-sharing culture.

When story sharing happens

Story sharing happens:

- During common quiet simple tasks. We might as well share stories as we spin, knit, weave, quilt, sew, cook, can, carve, whittle, paint, and so on. 0r—more likely today—let's do something quiet together while we share stories.
- During milestones. We mark important days by looking back into the past.
- During after-parties. In the quiet time after the big event, when the pressure is off, we can relax and simply connect.

If you want to support healthy story sharing in your community or organization, ask yourself: When do we share stories? What are our common quiet simple tasks? What milestones do we celebrate? How do we celebrate them? Do we have after-parties? When? What can we do to encourage story sharing during all of these times?

Where story sharing happens

Story sharing happens in places of relaxed purpose. These are places in which people have something to do (shop, get their hair cut, eat a meal, use tools, find a book), but also permission to linger and connect. The purpose of the place creates a central topic to discuss (products, hair, food, tools, books). And its owners or managers negotiate and maintain norms of behavior and responsibility.

Story sharing also happens in multi-purpose places. People go to multi-purpose places for many reasons: to meet, plan, play, celebrate, eat, buy, and connect. Parks, sidewalks, porches, town squares, playgrounds, community markets, church halls, and community centers are all examples of multi-purpose places. A multi-purpose place doesn't have a central topic to discuss, but it does often have story-eliciting cues such as newspapers, artwork, historical memorabilia, or a shared vista. And as people gather in these places, they negotiate behavioral norms within them.

Distinguishing between these two types of places is not important, and besides, places can fit into both categories at once. The most important distinction is between these places

and other places where there is no time, space, or permission to share stories, nothing to talk about, and no way to negotiate behavioral norms. For example, people don't expect to share stories at a police station, in a courtroom, at a loud dance party, or in a hospital emergency room. In those places people arrange story-sharing conversations in other places by saying things like, "Let's go somewhere where we can talk."

Edges and story sharing

Edges are places between places where people bump into each other and stop to chat—or don't, as the case may be. To stop and chat, especially when chatting includes story sharing, people need some measure of privacy and safety, both physically and socially.

- An inviting edge provides a quiet, safe, and socially acceptable space to stop and chat. The most inviting edges look out on an interesting view, like a busy street, a forested park, or a museum lobby. Inviting edges support story sharing well, and the better they are designed, the better they support it.
- An improvised edge is not designed as a meeting place, but it is sufficiently quiet, safe, and socially acceptable to allow social rituals of connection to grow up around it. In many communities, such rituals develop in parking lots, on abandoned lots, or on quiet streets. Improvised edges support story sharing, but the rituals required to create them take time to develop, and they cannot develop if story sharing in the community is otherwise unhealthy.
- A lifeless edge provides no accommodation for story sharing, intentional or otherwise. Stopping and chatting feels awkward and uncomfortable, and the space itself seems to discourage association. Lifeless edges destroy story sharing.

If you want to support healthy story sharing in your community or organization, ask yourself: Where do we share stories?

- Where are our places of relaxed purpose?
- Where are our multi-purpose places?
- What can we do to support story sharing in these places?
- Where are our inviting edges? What makes them inviting? Can we make them even more inviting?
- Where are our improvised edges? What rituals of social connection have grown up around them? How can we support those rituals?
- Where are our lifeless edges? What makes them lifeless? How can we transform them into inviting edges?

Chapter 3

Introducing Participatory Narrative Inquiry

Participatory Narrative Inquiry is a form of Participatory Action Research in which groups of people participate in gathering and working with raw stories of personal experience to make sense of complex situations for better decision making. PNI focuses on the profound consideration of values, beliefs, feelings, and perspectives through the recounting and interpretation of lived experience.

Essential PNI phases

PNI projects vary enormously in scope and ambition. They can take place over hours or years, and they can include ten or ten thousand participants. Within that variety, every PNI project has three essential phases.

Story collection

In the first phase of a PNI project, stories are gathered together. People talk, and people listen. Stories can be collected in a number of different ways (as we will explore later in this book), but stories are always gathered in some way.

Sensemaking

In the second essential phase of PNI, people make sense of the stories that have been gathered. Discussions take place; patterns emerge; discoveries are made; perspectives are explored; insights arise; actions are proposed.

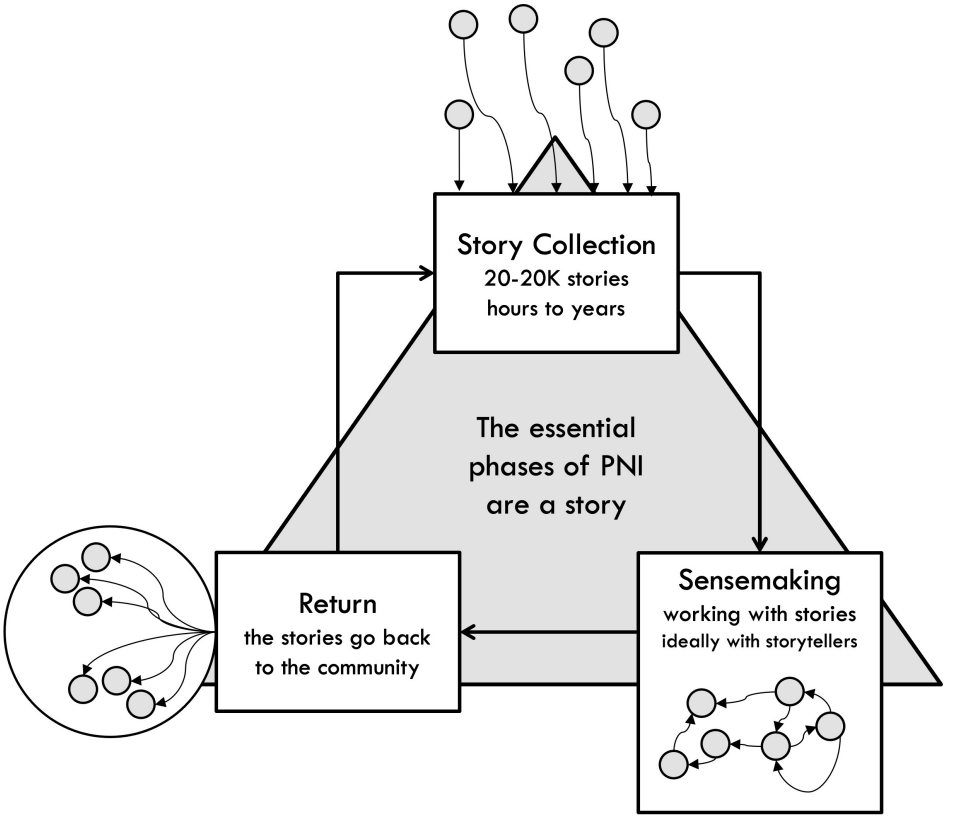
Ideally, all of the people who told the gathered stories are present in the sensemaking phase. This ideal may not always be possible in practice, but it is always worth striving towards.

Return

In the third essential phase of PNI, the stories return to the people and to the community in some way.

All participatory work has a return phase, and PNI is no exception. When you ask people to do something with you, you can expect that they will talk to other people about what they did. The best PNI projects support the return phase by helping their participants pass on the stories they told and heard.

Also, every PNI project is a story, and that story also returns to the community, to be told and heard and made sense of in the times to come.



Optional PNI phases

PNI also has three optional phases. Most small projects do not include them, and most large projects do.

Planning

If your PNI project is large or ambitious, it is wise to take some time to consider your options and test your plans. Some large PNI projects include pilot projects, which are small but complete PNI projects nested inside the planning phase of a larger project.

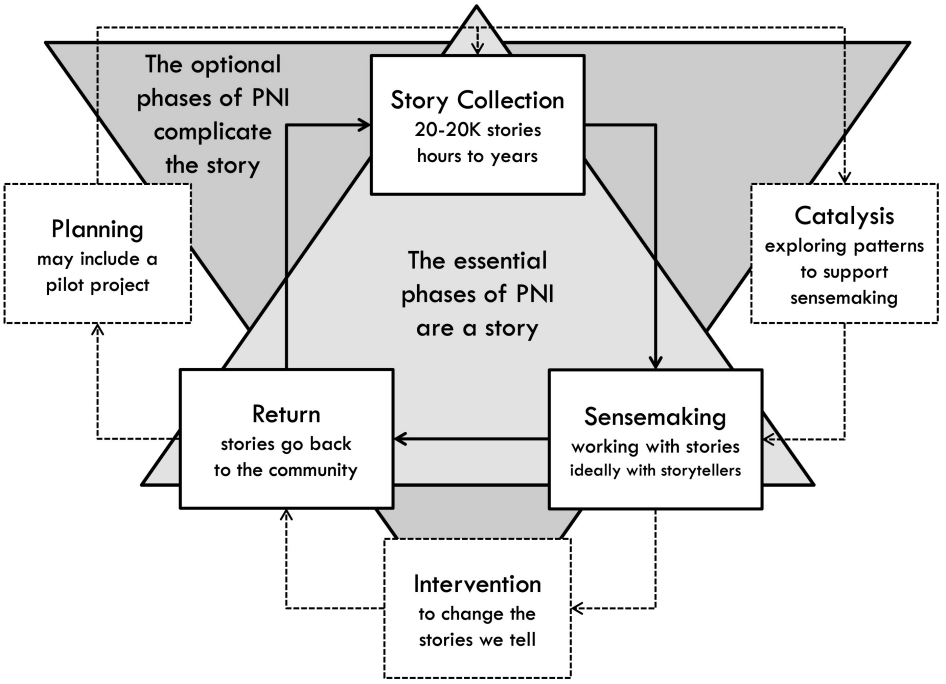
Catalysis

During catalysis, people use mixed-methods research techniques to find patterns in stories and answers to questions. This is often done by researchers, but it can also be done by project participants in facilitated group meetings.

Unlike analysis, which presents definitive answers to be accepted or rejected, catalysis builds a multi-perspective game-like experience that helps groups of people discover insights in the sensemaking phase of PNI.

Intervention

A narrative intervention is an action taken to change the flow of stories in the team, family, community, or organization. PNI projects sometimes use the intervention phase to incorporate more action-oriented approaches to narrative or participatory work. For example, a PNI project could include a nested project that uses Narrative Therapy or Participatory Theatre. Intervention ideas often emerge during sensemaking.



None of this is new

PNI is not that far removed from the way people have been working with stories for thousands of years. We all tell stories every day, and we all make sense of stories and pass them on. PNI amplifies and focuses this natural process to help groups of people work towards common goals.

None of this stands alone

PNI connects to and has been influenced by many adjacent fields, including narrative inquiry, oral history, narratology, case-based reasoning, cultural anthropology, folklore studies, mixed-methods research, complexity theory, narrative therapy, participatory theatre, participatory art and design, narrative coaching, narrative medicine, and various dialogue and decision support methods.

The principles of PNI

PNI helps stories get to where they need to go

The central goal of PNI is to find the stories people need to tell and take them to the people who need to hear them in order to help the entire team, family, community, or organization.

PNI projects may include aspects of study, preservation, and communication, but they never focus solely on those purposes.

It's all about decisions

All of the ideas and methods in PNI focus on helping groups of people make better decisions together, decisions everyone can live with in peace.

Don't mess with the stories

PNI practitioners never polish or improve the stories they collect. PNI keeps its stories raw, simple, and authentic.

People know their stories

PNI asks its participants what their stories mean—to them, not to anyone else. And PNI never asks people to analyze, examine, or justify their stories. It only asks them to reflect on, explore, and make sense of their stories.

Don't boil stories down; boil them up

In PNI we don't hide emotion in dull reports. We work with stories to express, not repress, how people feel.

The play's the thing

Story sharing is a social game that helps people play with reality and possibility. Likewise, PNI helps people use their imaginations—together—to explore what has/not happened and what could/not and should/not happen.

Stories nest

People use stories to explore conflict and contrast. A story of an argument, for example, does not always end in agreement. Instead, such a story might include within it nested stories that recount the diverse experiences of the people involved. In the same way, a PNI project can bring awareness and understanding to a community when consensus is impossible.

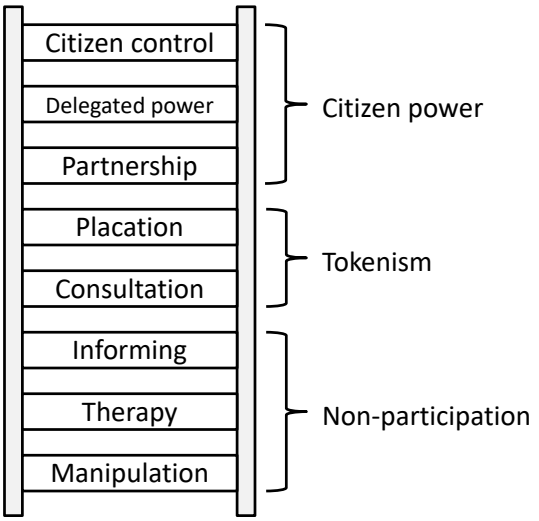
If you do not make PNI your own, you are not doing PNI

When you use PNI, you bring your own background, skills, talents, biases, limitations, and personality to it. That's a wonderful thing, because PNI is not a dogma. It's alive, it's growing, and it needs you.

Ethics in PNI

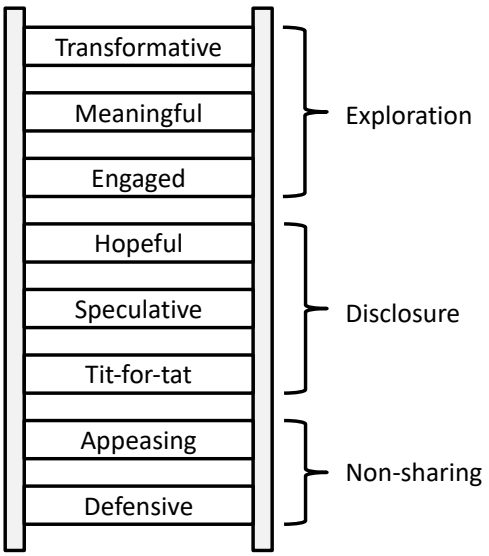
In participatory work, Sherry Arnstein's Ladder of Citizen Participation is a respected tool for defining what does and does not count as participation.

Arnstein's Ladder of Participation

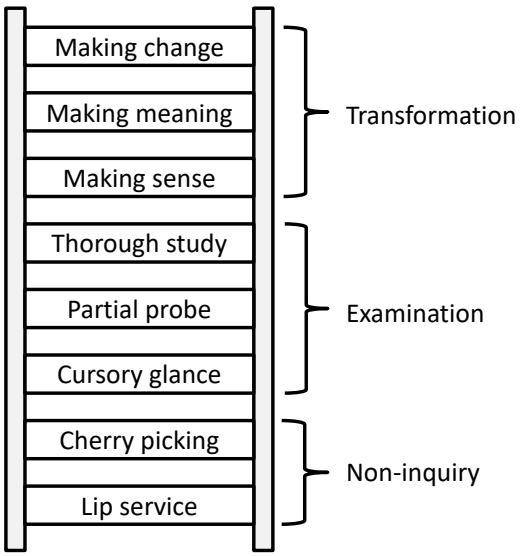


PNI is a participatory method, so Arnstein's ladder applies to it. The higher up the ladder you are, the more you are doing PNI. But PNI isn't just about participation; it's also about narrative and inquiry. So I made some ladders for those things too.

The PNI Ladder of Narrative (Story Sharing)



The PNI Ladder of Inquiry



If you are at the top of all three ladders, you are definitely doing PNI. If you are at the bottom of all three ladders, you are definitely *not* doing PNI.

If you are somewhere in the middle, whether you are doing PNI depends on why you are where you are. If you are trying to work your way up, you might still be doing PNI. People share stories to negotiate and to build trust, even in low-trust situations. Partial participation is not ideal, but it can sow the seeds of greater participation in time, whether the barrier comes from above or below.

What can you do to work towards the top of these scales? Do the things on the left side of this table, and don't do the things on the right.

If you want to do PNI	If you don't want to do PNI
Find participants who are willing and able to share stories with each other around a topic of common interest.	Find people who have stories project funders want.
Treat all community members, facilitators, researchers, and funders as co-researchers.	Treat the people who tell the stories as subjects to be examined by researchers for the benefit of funders.
Build a process that helps all co-researchers pursue their individual and collective goals by sharing and working with stories.	Build a process that provides the minimum level of participation required to get subjects to hand over their stories.
Empower co-researchers by creating an atmosphere of listening, curiosity, safety, clarity, freedom, transparency, and honesty.	Disempower subjects by creating an atmosphere of interrogation, criticism, intimidation, obfuscation, constraint, opacity, and duplicity.
Work with each co-researcher at the level of participation they prefer, from peripheral (sharing a story) to engaged (making sense of stories) to central (playing a part in decision making).	Work with each subject at a level of interaction chosen by funders and researchers, with no opportunity for challenge or change.
Erect no barrier but interest; set no requirement but willingness.	Erect barriers and set requirements based on power and status.
Make all project decisions transparent and open to challenge by all co-researchers.	Make all project decisions opaque and impossible to challenge (except by funders).

Chapter 4

Project Planning

The best way to plan a PNI project is to start at the broadest and most general level, then work your way toward more specific plans.

1. Build a *foundation* for your project by exploring your overall goals and topic.
2. Understand your *context* by considering people and perspectives.
3. Make specific *plans* by deciding on your scale and process.

Along the way, answering six essential questions can help you build a solid project plan.

1. Foundation
   - Goals: Why are you doing the project?
   - Topic: What is the project about?
2. Context
   - People: Who matters to your project?
   - Perspectives: What experiences matter to your project?
3. Plans
   - Scale: How big will your project be?
   - Process: How will you carry out your project?

If you are working in a group, or if you have an oversight committee, *don't move forward until you agree* on your answers to these six questions. Taken together, they will be your project's touchstone and your constitution for collaboration.

In this chapter we will go through each of the three steps and six questions.

Foundation: Explore your goals and topic

To explore your project's goals and topic, think about why you are doing the project, what it is fundamentally about, and what you hope to achieve by doing it.

A goals-and-topic exploration exercise

Here's a simple planning exercise you can use. It can help you think about why you are doing the project and what matters most to you. If you are working in a team, the exercise can help you bring differences and misunderstandings to the surface while you still have the flexibility to adapt.

Set aside at least an hour. Include everyone who will be helping to run or make decisions about the project. If you have an advisory group, a steering committee, or an involved funder, you can include them as well.

Share some stories

Everyone in the group: working on your own, choose a scenario from the following table.

Scenario	Description	For example
Ask me anything	If you could ask a question and be guaranteed an honest answer, whom would you ask, and about what?	We asked the customers who have stopped coming here why they left.
Magic ears	If you could overhear any conversation, whom would you want to listen to, and where and when?	I overheard people talking about whether they think I'd make a good mayor.
Magic eyes	If you could observe any event, interaction, or situation, what would you want to see happen?	We watched people find courage they didn't know they had in terrible circumstances.
Project aspects	Choose an aspect of your project that matters to you. Tell a story about it.	We brought people together on both sides of the issue.

Next, choose an outcome from this table.

Outcome	Description	For example
Colossal success	Tell the story of your project succeeding far better than you had expected. What happened, and how did you feel about it?	We learned *so much* in this project. I can't wait to put our new plans into action!
Miserable failure	Tell the story of your project failing miserably.	We didn't find out anything we didn't know already. The whole project was a total waste of time we can't get back again.
Acceptable outcome	Tell a story about the project that falls somewhere in the middle, not perfect but not a waste of time either.	We knew about these issues before we did the project, but now we have a much better idea of what is *really* going on. We can use this.

Finally, combine your scenario and outcome into *a fictional story about the future of your project*. What could happen?

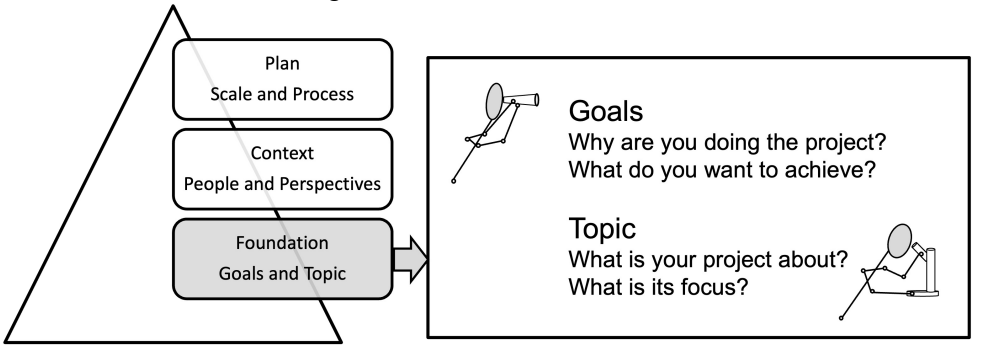
When everyone is ready, tell each other the stories you imagined. Make sure everyone has a chance to tell at least one story. Don't critique the stories, and don't spend a lot of time delving into details. Just throw your game pieces (your scenarios and outcomes) together and see what comes to mind.

Look for patterns

When you have told at least a dozen stories, working together, look for patterns in them. What do they tell you about your hopes and fears for the project? Does anything about them surprise you? Do you see any dangers you should avoid or opportunities you can use? Are there any needs, assets, gaps, or assumptions you would like to talk about? What do the stories say to you about your project? Is there anything you want to reconsider, learn more about, or change?

Answer the first two PNI planning questions

After you have shared and talked about some project stories, you should be able to answer the first two of the six PNI Planning Questions.



Context: Understand your people and perspectives

The next step in project planning is to think about your participants and their experiences with (and perceptions of) you and your topic.

Think about how many participants you want to include

How many participants does your project need? The answer depends on how deeply and broadly you want to explore your topic, the proportion of your community or organization you want to include, and how much time and help you will have to carry out the project.

But don't pay too much attention to raw numbers. What you want to maximize is *participatory energy*, and that only partly depends on how many participants you can find. I've seen PNI projects with 20 attentive participants produce more meaningful results than projects with 1000 barely-there participants.

Think about how you will invite participants

How will you invite people to join your project? To decide, answer these questions:

- How many people could potentially participate in your project? How much larger is that number than the number of participants you will need for the project?
- How much do you know about your potential participants? For example, can you guess how interested they might be in your topic?

If you have a large pool of potential participants and you know little about them, your best bet is to *help people find you*. These are some ways to do that.

Method	How to do it	Requirements	Limitations
Broadcast channels	Send an invitation to everyone on a list.	Requires a list that calls forth a common identity, which confers a social obligation to participate.	Can result in a sparse and scattered response.
Targeted advertising	Put up a sign or a website that invites people to join the project.	Requires a place (physical or virtual) that community members often visit.	Can miss people whose habits take them to other places at other times.
Spontaneous enlistment	Put yourself and your invitation in the right place at the right time, either once or at each stage of your project.	Requires you to know (or find out) the best places and times to find participants.	

If you have a small pool of potential participants and you know a lot about them, it is best to reach out to people directly. These are some ways to do that.

Method	How to do it	Requirements	Limitations
Networks of influence	Ask people to ask other people to participate.	Requires a network of people who trust each other, and some who trust you.	Can leave out newcomers, introverts, and anyone who is seen as strange.
Targeted invitations	Choose specific participants to invite one by one.	Requires trust, plus knowledge about participants.	Could seem unfair to those who were not asked.
Chains of command	Ask whoever is in charge to tell people to participate.	Requires a hierarchy, but also requires some level of trust. If there is no trust, people will *attend* the project, but they will not *attend to* it.	Can produce grudging, bare-minimum participation, even if people like what the project is doing.

Since all invitation methods produce biased, self-selected subsets of participatory energy, it's best to combine at least two methods.

No matter how you choose to reach out to people, keep two things in mind.

1. **Find the energy**. Don't look for stories. Look for unmet needs. Find people who will *appreciate the opportunity* to be heard and to exchange experiences with other people.
2. **Be realistic**. Do not allow yourself to indulge in wishful thinking about the participatory energy you will find once you get started. If you aren't sure whether anyone will want to be part of the project you want to do, don't pretend you know. Find out.

Think about how you will help people find the time to participate

Should you pay people to participate in your project? It depends. If they want to participate but can't without help, paying them for their time will strengthen the project. If they have no interest in the project, paying them will weaken it. If you aren't sure, ask some potential participants what they think of the idea. If they respond with enthusiasm *for the project*, that's a good sign. If they respond with enthusiasm *for the payment*, that's a bad sign.

It is always helpful to give participants a project gift that shows your appreciation, tells the story of the project, and provides a memento of participation. A respectful, useful, and well-chosen project gift is a gesture of good faith, and it's a way to acknowledge that the project belongs to its participants at least as much as it belongs to you.

Get to know your participants

Your project's most precious resource is not your time, your expertise, your tools, or your techniques. It is the time and attention of your participants. Taking the time to think about their perceptions and needs maximizes the impact of their investment.

Participant groups

Will all of your participants have similar experiences with, and perspectives on, your topic? Will they all feel the same way about your project? Will they all respond to your invitation to participate in the same way? Or will they differ? If they will differ, are there any groups you need to consider separately?

Status, power, and authority

Because story sharing is strongly linked to power and status in communities and organizations, you need to pay attention to those things as you prepare to ask people to share and work with stories.

If your participants	You can
Have high status	Prove the value of the project; defer to their authority; ask humbly for their help.
Have low status	Encourage them to speak up; empower them to play a role in the project; assure them that they are qualified to participate.
Have different levels of status	Plan to keep the groups separate, at least for part of the project.

Perceptions of you

You will hold a prominent place in the social context in which your participants will find themselves during your project. So their perception of you, your role or position, and the people or groups you represent will affect how many stories you can gather and what those stories will be like. If there is a cultural barrier (or a sense of distrust) between you and these participants—whatever "you" means to them—you will need to spend extra time testing and refining your approach. You may also need to expand your project team to include people who will create a more relevant and useful social context for story sharing.

Perceptions of participation

In my project work I have come across several common misperceptions of invitations to participate in story work. If you know your participants well, you can anticipate these misperceptions and work to counter them. For each participant group, ask yourself how they will perceive your invitation to participate in the project. I've listed these in order of how often I've seen them happen.

If you think people will see your invitation as	You can
A test	Reassure them that they are already qualified and included. Show them that you respect and value their knowledge and experience.
A nuisance	Convince them of the value of participation, communicate the goals of the project, and ask people for their help in making the effort a success
A meaningless exercise	Explain your method, prove that it has value, and to ask them for help making the process work.
A favor	Give them a reason to get involved for their own benefit.
A party	Place extra stress on the serious and ambitious goals of the project; ask them to take on some of the burden of making the project work, even if it is not always fun.
A danger	Give them a sense of hope and agency. Explain what the project can bring to them and to the community or organization. Also emphasize the fact that *they get to decide* how much they will participate in the project.
An opportunity to gain status	Ask them to put aside their individual goals and think about their hopes for the future of the entire community or organization.
An opportunity to win an argument	Communicate to them that the project will use story sharing to reduce (rather than engage in) conflict by helping everyone listen to and understand every point of view.

Participation ability

Also consider your participants' ability to participate.

If they are	You can
Too busy to participate	Reduce your ambitions, lengthen your timeline, find more participants, consider compensation, or find other ways to help people share stories.
Held back by logistical barriers (physical, cognitive, legal)	Learn more about the abilities they *do* have. Adapt the project to work within their limitations.
Held back by behavioral barriers (emotional, psychological, cultural)	*Talk* to them. Ask them what you can do to help them feel safe and free to share and explore their experiences.
Different barriers for different groups	Think about how you can give everyone the opportunity to participate in a way that works for them.

Consider how your participants will interact with your topic

The topic you want to ask about interacts with the people you will be asking to talk, so it is impossible to consider them separately. These questions pertain to that interaction rather than to the topic alone.

Emotion

Most PNI projects—and most stories—have something to do with emotion, but some are more emotional than others. The more emotional of a topic you want to explore, the more you will need to test and refine your plans, listen to (or include) a larger group in your planning process, and build a supportive and transparent privacy policy.

- Ask people where, when, and with whom they have talked about the topic in the past. If you notice any contexts mentioned often, see if you can reproduce them
- Ask people where, when, and with whom they *wish* they could talk about the topic. Then see if you can create those contexts.
- Give people multiple ways to share and work with stories. Help them find a form of participation that works for them.
- When emotions are high, people tend to be on the lookout for subtle messages and commands. Test everything you plan to say.

Understanding

Your participants might have a hard time talking about your topic because *they don't know what to say* about it. It could be abstract, systemic, apparently trivial, or far back in the past. In situations like these, the obstacle is not a lack of safety or freedom; it's a lack of understanding, which can lead to muddled and meaningless results. In these cases a few extra steps can help to bridge the gap.

- Spend some extra time up front asking people about the topic you want to explore. Don't gather any stories yet; just ask questions like:
  - When you think about ___, what words or phrases come to mind?

  - What does ___ mean to you?
  - Have you ever heard the term "___?" What do you think it means?
- Show some potential participants your invitations and instructions, and *ask them to say what you said back to you in their own words*. If they can't, or won't, or seem afraid to try, or if their explanations don't match yours, keep working on your messages until people start giving you back what you meant to say to them.

Build your win-win proposal

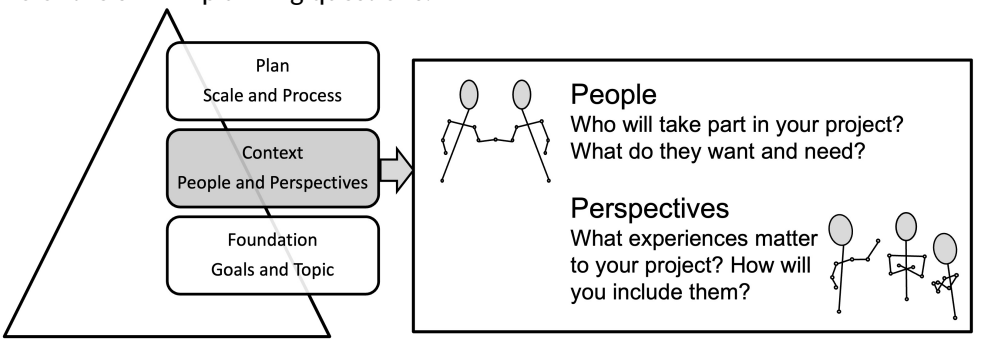
Now it's time to get to the heart of *what your participants want* from the project. Think about every participant group separately, especially groups with different amounts of power. Ask yourself:

- What kind of project would this group be excited to participate in?
- If this project isn't like that already, how can we improve it?
- If different groups want different things, what can we do to help them all get at least some of what they want?

Show your project plans to some people from each participant group. Do they respond with enthusiasm? Indifference? Suspicion? Resignation? If they don't seem interested, ask them what sort of project they *would* be excited to participate in. Then ask yourself the above questions again. Keep doing this until you find a project plan that works for everyone.

Answer two more PNI planning questions

Once your win-win proposal has been built and tested, you should be ready to answer the next two of the six PNI planning questions.



Consider a pilot project

If you are having a hard time answering the "People" and "Perspectives" planning questions, you might want to pause your planning and learn more about your participants before you move on. One way to do that is to run a pilot project: a small but complete PNI project that is embedded in the planning phase of a larger project.

Pilot projects are useful in ambitious projects (ones that involve many people, stories, questions, or topics), in projects whose topics are sensitive or private, and in projects with a large number of unknown elements. In all of these cases, you can maximize your chance of success by gathering extra background information before you get started in earnest.

Plan: Make decisions about your scale and process

The last phase of planning wades into the details of what you will actually *do* in your project.

Think about your resources

Consider your skills, time, knowledge, and tools. If any of these things are lacking, there are things you can do.

If you are	You can
New to PNI	Start small. Ask a few friends, family members, or colleagues to help you carry out a practice project over a few hours, days, or weeks.
Uninformed about your participants or topic	Build a project team that includes some people who know more than you do. Listen to what they say.
Unable to spend the time you will need to do the project well	Get some help or scale back your plans. You can always do a bigger project later.
Unequipped to handle the number of stories you would like to collect	Whichever method you want to use to gather your stories, try it out with a handful of stories. If your collection goal seems unreachable, reduce it, get some help, or give yourself some extra time to build your skills as you go.

Think about the phases of PNI

Which of the three essential phases of PNI will be the most important to your project? Which will be the least important? And which of PNI's optional phases will you be important to your project? How much time and attention do you want to spend on each project phase? If you don't think you need some of the phases, do you want to rule them out from the start, or do you want to leave some flexibility in your plan so you can incorporate them if the need arises?

Build your privacy policy

Every PNI project needs a respectful and transparent privacy policy. To create it, there are four basic privacy decisions you will need to make.

- **Disclosure**. When you were working out your win-win proposal, if your potential participants were concerned about disclosing their feelings, values, and beliefs, you can adjust your project to reduce the risk of disclosure. You can gather less information to get more meaning, and you can give your participants more control over how their stories are recorded and used.
- **Anonymity**. If you were gathering only factual information about people, it would be easy to ensure anonymity. Stories, however, contain contextual clues that can make it possible to guess who told them *even when names are not collected*. So when you

gather stories, you can't just provide *direct* anonymity, the kind you can ensure by not taking names. You also need to provide indirect anonymity by telling your participants who will hear or see the stories you are asking them to tell. That information will help them choose which stories they want to tell and how they want to tell them.

- **Exposure**. People want to be heard, but they don't want what they say to be distorted, used against them, used for purposes they don't support, or told to the wrong people. As you plan your project, think about who will get to see or hear what participants say, how the stories will be made available, and how participants will be given a say in what happens to the stories they tell.
- **Regret**. How strongly you will need to support amendment or retraction of stories and other data will depend on how sensitive your topic is and how much your participants are concerned about privacy. Offering the option can be helpful even if no one uses it, because people see that you are taking their concerns seriously.

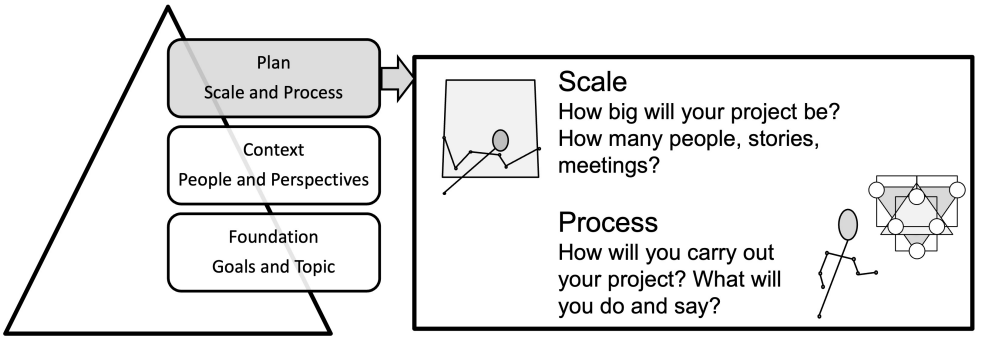
Explaining your privacy policy

Some of your participants probably won't care about privacy at all; some will care only if something out-of-the-way happens; and some will care very much. The best privacy policy is one that gives everyone the information they need. Here is a simple example.

Tell people	For example
What you will and will not collect	Everything you say in this ___ is anonymous. Every question is optional. Say as little or as much as you like. After the ___, we will ___, taking care to ___.
What you want people to conceal	Please do not reveal identifying information about yourself or anyone else, including ___. We will remove inadvertent identifications by ___.
How what is said will be used and distributed	The ___ we gather in this ___ will be used, along with other ___ gathered in ___, in a series of ___, to which ___ is/are invited. To join, ___. Your ___ may also be used in/to ___. Do you give us permission to ___?
How people can change their minds	You can review your ___ by ___, and you can change or remove it by ___.

Answer the last two PNI planning questions

Now it's time to answer the last two questions in the list.



Write your project synopsis

The last step in planning your project is to prepare a brief synopsis that describes what you plan to do and puts forth your win-win proposal. Feature this synopsis in every invitation. Put it right up front, so people know exactly what is going on.

Here's a fictional example:

> To improve our patient care [goal], our support staff [people] will collect stories about office visits [topic] from 50 [scale] patients and doctors [people] across a spectrum of disorders and complaints [perspectives]. Then a group of patients and doctors [people] will meet to look at and think about the patterns they see in the stories [process]. Our group [people] will disseminate a report on the meeting [process] to all doctors and waiting rooms in the network [people].

Your synopsis will serve as a touchstone throughout your project. Feature it in every invitation. Put it right up front so people know exactly what is going on and why.

Chapter 5

Story Collection

In Chapter Two we talked about how the word "story" means different things to different people. That's a general definition of the word that suits all purposes. But PNI has a specific purpose. Which sorts of stories work best in PNI projects?

The best stories for PNI recount experiences

The best stories for PNI tell about things that happened to specific people, not to whole communities or organizations, and not to nobody in particular. For example, consider this story.

> My grandmother started at the hospital in 1918, just three years after it was built. She was in maternity, but with the surge of flu patients, she took on a second job to help out. It was exhausting, but she was so proud of her work.

Now consider this story.

> The town of Eastville was founded in 1829. Its town hall was erected in 1878. The school followed in 1901, and the hospital opened its doors in 1915. Hundreds of lives were saved during the flu epidemic.

Do you see the difference? The first story recounts events *as experienced by a real person* who had real feelings about what happened to her. The second story recounts the same general events, but without perspectives or emotions.

Why does this matter? Because to make sense of stories, people have to be able to imagine themselves experiencing the events described in the stories you provide to them. It's hard to imagine yourself in a story that has no people in it.

The best stories for PNI have plots

Facts, opinions, arguments, and explanations exist outside of time. While some may consider these things to be stories (usually in a communicating or connecting sense), they are not as useful in PNI as are stories with plots that play out across a span of time.

For example, this statement flows through time.

> When I started this job ten years ago, I didn't know what I was doing. To be honest, I wasn't sure I was going to make it. But I did, and now I help new folks get started.

In the statement, the storyteller begins by recounting how they felt at one point in time ("When I started"). Then there is a moment of uncertainty, of branching possibilities, when it is not clear what will happen next ("I wasn't sure"). Finally, the story resolves itself into a new state at a new point in time ("and now I help").

In contrast, the following statement exists outside of time. It has no beginning, middle, or end. It just is.

> I like my work. It can be hard. But I'm good at what I do, and I'm proud of that.

PNI helps people make sense of what has/not happened in the past and what could/not and should/not happen in the future. To do those things, people need stories that explore tensions between possibility, actuality, and desire.

The best stories for PNI reveal perspectives

When people feel safe, heard, and respected, they reflect on their experiences and reveal their true feelings, values, and beliefs about what happened to them.

> I wasn't sure if I would make it as a welder. It was daunting at first. But I like it. I like making useful things. It makes me feel like a useful person.

When people don't feel safe, heard, and respected, they defend their experiences, and they tell surface-level stories that hide their feelings, values, and beliefs.

> I've been working here five years. I started when was 40. Yeah, the work is okay. Sure, I like it. Yes, I am good at my job.

Only the first kind of story is useful in PNI. Why? Because in most PNI projects, the situations people need to make sense of involve other people, and you can't understand people without understanding what they feel, think, and believe.

This advice is for you, not for your participants

Guide your participants toward telling these kinds of stories, but guide them indirectly, in your introductions, questions, and instructions. Don't mention these criteria to your participants, and don't ever criticize the stories people tell. Just use these descriptions yourself, to think about how well your story collection will support sensemaking and whether you need to adjust your approach.

A quick overview of story collection methods

There are at least eight ways to gather stories for a PNI project. I will say more about each method later on, but to start the chapter I'll give you a quick glimpse of your options.

1. A **one-on-one interview** is a listening conversation between you and one project participant. This option is useful when your participants don't know or trust each other,

when your topic is sensitive, or when your participants are of especially high or low status in your community or organization.

2. A **group interview** is a guided conversation between you and 2-5 project participants. This option is useful when your participants know each other and might remember their experiences better if they talk to each other than to you.
3. A **peer interview** is a suggested conversation among 2-3 project participants. This option is useful when your participants know and trust some but not all people in the community, or when people might be bored by an interview or survey, or when people are too busy to attend a meeting.
4. A **survey** is a form people fill out. This option is useful when your access to your participants is shallow or fleeting or when you have too few or too many participants to reach in any other way.
5. A **journal** is a periodic reflection from one project participant. This option is useful when you have a small group of strongly committed participants who want to explore a topic in a deep and focused way.
6. A **narrative incident account** is a story about a witnessed event from the perspective of a project participant. This option is useful when your participants already fill out forms each they help people in some way.
7. A **story-sharing session** is a meeting of 3-30 participants that includes game-like story-sharing activities. This option is useful when your participants are enthusiastic and your topic is not particularly sensitive.
8. A **gleaned story** is a story that was told and recorded before your project began. This option is useful when you have a record of some conversations but no other way to listen to people.

Two quick points about methods before we go on:

- You can use multiple methods at the same time. You can offer people a choice of methods, use different methods for different groups, or use different methods in sequence, with one method setting the stage for the next.
- You can run an entire PNI project without recording a single story, as long as your participants stay with the project from start to finish. For example, you might facilitate a workshop that moves from collection in the morning to sensemaking in the afternoon.

Asking people to tell stories

No matter how you choose to gather your stories, every PNI project has to find a way to ask people to recount their experiences. What is the best way to do that?

- You could ask directly for a story. You could say, “Tell me a story about trust.”
- You could tell a story yourself. You could say, for example, “Trust saved my life one day. I was driving, and my wife suddenly grabbed the steering wheel. If I hadn’t trusted her, I wouldn’t have let her avoid the truck that was about to hit us.” And then you could wait and see what people say in response.

- You could ask a question whose answer is a story. You could say, "Have you ever trusted anyone with your life? What happened?"

I've tried all three of these ways. The third way works better. *Much* better.

Examples of story-eliciting questions

You might be brimming with story-eliciting questions you want to ask. But if you're not, don't worry; this section will give you some ideas you can use. You can find many more examples in the *Working with Stories Sourcebook*.

- Ask about a point in time. For example:
  - What was the most memorable hour of your career at this company?
  - You waited in a line in our department today. Was there a time during your wait when you felt frustrated?
  - Was there ever a moment when you felt that trust in your team was either strengthened or weakened?
- Ask about an event. For example:
  - Can you describe an occasion you remember as being important on your bus route in the past year?
  - Can you recount for us an event that took place during your time here when you felt particularly calm and at ease?
  - Our museum's motto is "Everyone wants to learn." Was there a moment during your visit today in which that motto was particularly well supported by someone you met?
- Ask about an extreme. For example:
  - What was the best moment of your visit to the library today?
  - As your car was being worked on today, when did you feel the most frustrated with the process?
  - Can you remember feeling particularly appreciated in your work?
- Ask about surprise or change. For example:
  - Can you tell me about a time during our training class today when you were surprised by something the teacher said?
  - Was there ever a moment when things seemed to shift and change, and after that nothing was the same again?
  - What do you think was a turning point in your thinking about diplomacy?
- Ask about a decision, person, place, or thing. For example:
  - When you drove into town today, what did you think as you drove by our new park?
  - Can you recount for us the day you first met your spouse?
  - You've been driving this car for nearly twenty years now. When you look at it, do any special times come to mind?

Writing good story-eliciting questions

Which story-eliciting questions would be best for *your* project, not just in general? That's a question only you can answer.

Step 1. Brainstorm

Jot down some questions you *wish* you could ask people about their experiences with your topic. Don't worry too much about whether your questions match any of the categories in the section above. Just fantasize about the questions you would like to ask.

Here's a little future-history planning exercise you can use, either by yourself or with your planning or oversight team:

1. Imagine yourself in the future. You have finished gathering your stories, and you couldn't be happier with them. They are perfectly relevant, useful, and meaningful.
2. In that ideal future, looking at your ideal stories, think of a story that stands out as being exactly what you were after when you started the project. If you can't think of a story right away, don't force it. Just reminisce in a roundabout way about the experiences you have had and heard about related to your topic. You might need to do something else for a while before a story drifts into your mind. Have something to eat or drink, then think about the exercise again.
3. When a story comes to mind, tell it. Then ask yourself: why would someone tell that story? What question would make sense for it to be an answer to? Add the question to your wish list. Do this for every story that comes to mind.

Once you have a wish list of questions, go through the next four steps for each of them.

Step 2. Check that each question elicits stories

For each question you want to ask, *try to answer it without telling a story*. If you can, change the question. When you can't, stop.

For example, can you answer this question without telling a story?

> When you look back on your time living in our town, can you recall the first time you felt at home here? What was that day like for you?

You can answer that question without telling a story. You can say:

> It was last March. It was a good day.

That's not a story. It's a *reference* to a story—to whatever it was that happened on that day last March—but it's not a *story*. This question works better.

> When you look back on your time living in our town, can you recall the first time you felt at home here? Could you tell us what happened on that day?

In general, including the words "what happened" in any question makes it more likely that people will pick up on the fact that you are inviting them to tell a story.

Step 3. Check that each question invites reflection

The best story-eliciting questions invite participants to reflect on their experiences and convey permission and freedom to choose and recount an experience that matters—to them, not to you.

Consider this question:

> Looking back over your life, can you remember a time when you felt like someone had your back, like you could take a risk because they were there to help? Or did

> you ever feel like someone *didn't* help when you needed it? What happened that you remember?

The overall message of the question is: I am exploring this topic, and I invite you to think about it with me. I would like to understand your unique perspective on it. I am ready to hear whatever you want to tell me about what has happened to you. I'm listening.

Now consider this question:

> Tell about a time when someone had your back, when you could take a risk because they were there to help. What did they do, and how did it help?

The overall message of this question is: I am researching this topic. I don't invite you to think about it with me. I don't want to hear what you want to tell me. I just want answers to these specific questions. Now hold still while I extract them.

People do sometimes respond to bad story-eliciting questions like this one by telling stories. But they are cardboard stories, props set up to protect the real stories people wish they could tell.

Open, closed, and story ended questions. An open-ended question gives people the freedom to say anything at all about a topic. A closed-ended question solicits a specific, narrow response. *Story-ended questions* fall somewhere in between. They use socially significant cues to ask people to tell stories, excluding non-narrative responses. But within that restriction, they give people the freedom to tell any story they like in any way they like. For example:

Question	Example
Open-ended	How do you feel about our office?
Closed-ended	When was your last visit to our office?
Story-ended	What happened on your last visit to our office?

If your participants don't respond to your story-ended questions, step back and ask some open-ended questions instead. Stop gathering stories for a while and just listen. The answers you hear might help you build a better win-win proposal.

Step 4. Check that each question fits your context

There are no universally good story-eliciting questions. The same question that could make one project a success could cause another to fail. Think about these elements of your project's context as you evaluate your questions.

- With respect to your topic, are your participants experts or novices? If they are experts, help them zero in on a single experience to talk about. If they are novices, help them explore the minute-by-minute details of their few experiences.
- Are your participants concrete or abstract thinkers? If they think in concrete details, stick to the immediate subjective reality of their experiences and emotions. If they think in abstractions, invite them to delve deeply into the complex connections between their experiences and the way the world works (and should/not work).

- Will your participants be volunteers, or will they be obliged (or required) to participate? If they are volunteers, recognize and reward their enthusiasm. If they are conscripts, give them a sense of power over what happens.
- Does your topic have a natural time sequence to it? If so, choose questions that invite people to explore its overall time sequence. If not, look for questions that help people find time sequences within the topic that they can walk through. Turning points and times of transition are good times to ask about.

Step 5. Test your questions

Find some potential project participants, ask them your story-eliciting questions, and watch what they do. If they respond with energy and tell relevant stories, you're ready to go. If they don't respond, or don't tell stories, or tell irrelevant stories, work on your questions. Don't stop until you find the energy and utility you need.

Consider a menu of story-eliciting questions

A question menu is a list of three to five story-eliciting questions. Menus help participants find a match between their experiences and the project's goals. They also provide a sense of agency by allowing participants to make choices that actively shape the project and its outcomes.

A menu of questions might look like this:

Example	Explanation
When you look back on your time living in our neighborhood, can you recall the first time you really felt at home here? Could you tell us what happened on that day?	This is a safe question. It appeals to people who are afraid to speak up. Always start with the safest question.
Describe your best or worst day living in our neighborhood. What happened on that day?	This is a question about extremes. It helps people who can't think of anything to say.
Did you ever see a neighbor do something and think, "If we all acted like that, we'd get along so much better"? Or, did you ever think, "If we all acted like that, we'd never get along"? What did you see?	This is a spill-the-beans question. It gives people an opportunity to bestow praise or place blame.
If none of these questions appeals to you, tell us about anything that happened in our neighborhood that mattered to you.	This is for people who want permission to tell a specific story they have in mind, permission they might not be able to find in the previous questions.

You might have noticed that the different questions in this example menu connect to different answers in the "Check that each question fits your context" section above. For example, the "best or worst day" question is concrete, and the "did you ever think" question

is abstract. If your answers to those questions was "some of each," a menu can help you to give all of your participants what they need to feel comfortable.

How should you offer your menu of eliciting questions? In a survey, you can show people a menu of questions and ask them to choose a question to answer. In a group session, you can pass around a menu of questions or write it on a whiteboard. But menus can be hard to use in some situations, such as when you're talking on the phone. Asking people to remember a list of questions without anything to look at can confuse and intimidate them. If you can't *show* people a menu of questions, it's better to use a single well-written (and well-tested) question.

How many stories to collect

If you plan to go straight from story collection to sensemaking, you will need at least 20 stories to generate patterns your participants can talk about. If you plan to prepare catalytic material for sensemaking, you will need 100-300 stories. If you want to explore sub-topics or pay special attention to specific groups or locations, you will need a separate set of stories for each sub-topic, group, or location.

But don't get too enamored of large numbers. To create a story collection that will support sensemaking, you need to maximize *narrative richness*, or the degree to which your story collection can support productive sensemaking. Gathering relevant, meaningful, reflective, connected stories is more important than gathering the right number of stories.

If you have the resources to collect thousands of stories, stop and think before you plan to collect all the stories you can. It might be better to use your resources to gather fewer but deeper stories, ask more reflective questions, explore more sub-topics, or support more sensemaking. It might also be better to split your project into a series of smaller projects, each of which informs the planning of the next.

Asking questions about stories

When people share stories in ordinary conversation, polite listeners ask respectfully curious questions. They say things like:

- What did they say to that?
- How did you feel about that?
- Why do you think that happened?

People ask questions like these to show that they got the point of the story (because a story is a message), to understand and learn from the story (because a story is a thinking tool), and to show respect for the storyteller (because a story is a connection).

When we ask people questions about the stories they tell in a PNI project, we do the same thing, only in a more consistent and systematic way. For example, we ask everyone the same questions so we can learn from the patterns that appear in their answers.

How many questions to ask about each story

When you are gathering stories, how much can you reasonably expect your participants to say? Here are some guidelines.

If they feel	If they say	Elicit	Ask		List
			About each story	About each participant	
A fleeting moment of interest	What's this?	One story	3-5 questions	2-4 questions	3-5 max answers
A mild social obligation due to a public position of support	I come here often; I voted for you; I like your product	1-2 stories	6-9 questions	4-7 questions	6-8 max answers
A strong obligation tied to identity	This is for me; This is who I am	2-4 stories	10-15 questions	7-12 questions	9-12 max answers

You *can* ask for more than this, but you won't get meaningful responses.

If you plan to use the optional pattern-finding (catalytic) part of PNI, you also need to think about aligning the number of questions you ask with your ability to work with the data they will provide. A quick look at the "Scoping your exploration" section of the Narrative Catalysis chapter will help you make this decision.

Good questions about stories

From the perspective that *stories are messages*, the best questions focus on the story itself: its setting, characters, plot, and outcome. Some examples:

- What was unique about the time and place of this story? How would it have turned out in a different time or place?
- What was unique about the people in this story? How do you think it would have turned out differently if different people had been involved in it?
- What did the people in the story want or need? Did they get it? What helped them? What hindered them?
- Who would you say acted with the most and least responsibility in the story?
- What was the biggest change that took place in the story, from your point of view?
- How well would you say this story turned out? For whom? Did it turn out badly for anyone?

From the perspective that *stories are thinking tools*, the best questions focus on the meaning of the story and what can be learned from it. Some examples:

- How do you feel about this story?
- What do you wish had happened in this story?
- If stories like this one happened every day, what do you think ___ would be like? item What surprised you about this story?
- What does this story say to you about trust?
- What did you learn from this story? What lesson do you draw from it?

From the perspective that *stories are connections*, the best questions focus on the story of the story—where it came from, why it was told, and where it needs to go next. Some examples:

- Where did this story come from? Did it happen to you, or did you hear it from someone else? item Why do you think you chose this particular story to tell? What does it mean to you?
- In your experience, how common is what happened in this story? Does this sort of thing happen all the time in ___, or does it rarely happen?
- Is this a story you tell often, or have you never told it before?
- Who needs to hear this story, in your opinion? What would happen if they did hear it?
- What do you think ___ would say if they heard this story?

You can find more questions to ask about stories in the *Working with Stories Sourcebook*.

Open-ended and closed-ended questions

When you are asking questions about stories (and about people), you can ask open-ended questions (no options, they just talk/write) or closed-ended questions (they choose an option from a list or a point along a scale). Which is better depends on two factors.

Do you already know the answers? Open-ended questions work best when you can't guess how people will want to answer the question. They ask more of participants, who might skip them, but if you can't be sure how people will want to answer the question, you will need them to tell you.

What do you plan to do with the answers? If you plan to go straight from story collection to sensemaking, asking open-ended questions is the better option. They provide more freedom to speak, show more respect, and generate more variation. However, if you plan to support your sensemaking with catalytic material, use at least some closed-ended questions. It will save you time later on.

Choice and scale questions

When we use closed-ended questions in PNI, to make sure that participation is available, inviting, and respectful to each participant, we frame our questions using two simple question types that we can expect to be comfortable and familiar to every human being.

1. Choice questions: What color was the fish?

2. Scale questions: How big was the fish?

To write choice questions, if the answers aren't obvious (the streets in your town, for example), start with some open-ended brainstorming. Then shrink your list down to the number of answers you can actually expect people to handle. Also include an "other" write-in option so people can respond even if you guessed wrongly.

To write scale questions, lay out a range of answers between two extremes.

- You can ask people to choose a label: a word or phrase (very bad, bad, neither good nor bad, good, very good) or a number (on a scale from 0 to 10, how good?).
- You can ask people to make a mark or move an object (physically or virtually) on an unmarked scale between two extremes (move this button to any point between very bad and very good).
- You can ask people to move their bodies, either their fingers (point somewhere on this line between very good and very bad), their hands (put your hands together for very good; put your hands as far apart as they will go for very bad) or their whole selves (over here for very good, over there for very bad).

Tips on writing questions about stories

Ask questions that respect stories

In your PNI project, you want your participants to express themselves, learn from their experiences, and connect with other people. To make that happen, your participants must feel respected, valued, and heard. They must not feel that they are being evaluated or that they are required to perform to expectations. And *that* means that the questions you ask about stories must send two enabling messages.

1. **If it matters to you, it matters**. You want your participants to know that the only justification they need to tell a story is that it matters to them. They do not need to prove that the story they choose to tell is worth telling, and they do not have to tell a "good" story. So don't ask them if their story is memorable. Ask them what they remember most about it.
2. **This is not a test**. You want your participants to know that you are sincerely interested in what has happened to them and how they feel about it. You are not there to evaluate them, their story, the way they tell it, or their actions in it. You are only there to listen. So don't ask them what they could have done better. Ask them how they wish the story had ended.

Use narrative distance for safe exploration

Good questions about stories create narrative distance between the storyteller and their character in the story, who is both them and not them. Narrative distance can help participants see themselves from a new perspective, as if they were floating above themselves.

So when you ask questions about stories, don't draw attention to the storyteller. Help them maintain some distance between the version of themselves that is telling a story and the version of themselves that did things in the story. Ask them about *the characters in the story*, not about themselves, even if—especially if—they are the story's main character.

Not asking provides indirect anonymity that helps people to safely disclose their feelings, values, and beliefs.

Ask questions only storytellers can answer

The best questions about stories are questions that only their tellers can answer. If anyone else can answer the questions you want to ask, either by reading the stories or by knowing about the events described in them, don't waste your participants' precious time and attention on questions about those things. Instead, ask them how they feel about what happened to them and what they wish had happened—because nobody else can answer those questions.

Ask questions that matter and resonate

Find questions that want to be asked. Don't just pull out a standard list. Think about what you want to achieve with your project. Think about its fondest hopes and dreams. Find questions those dreams want to ask.

Transmit your excitement and energy

You are doing your project because you hope to achieve a goal that is important to you and to your participants. Keep working on your questions until you can see your energy for the project comes through in them.

Do not give non-responders nothing to say

Include at least one non-response option in each choice question you ask. This can help you learn something *even when people choose not to respond to the question*. The more information you can help people give you about *why* they aren't answering a question, the better you can support sensemaking.

Some options are: I don't know; I'm not sure; I don't remember; It's hard to say; That's too private; I'd like to skip this question; I don't understand the question; It's complicated; The question doesn't apply; I don't like the question; I don't think the question makes sense; None of these answers work for me; None of these.

Asking questions about your participants

After each person is finished telling the stories they want to tell, it is always a good idea to ask them some questions about themselves, for two reasons.

1. Asking people questions about themselves can provide revelatory context that can deepen your exploration of your collected stories.
2. Pairing indirect questions about stories with direct questions about people can create revelatory juxtapositions.

Views on issues

Embedding a small opinion survey in the questions you ask people can help you approach your topic in two ways at once. There are often telling differences between the things people say about a topic directly (by answering questions) and indirectly (by telling stories). You can ask questions like:

- How do you feel about ___? Do you think it's helpful or harmful?

- Which of these statements do you agree with most about ___?
- If you could write a law regulating ___, what would it say?
- What do you think causes ___? What would fix it?
- In an ideal world, what would ___ be like?

Views on the community or organization

Asking people to describe their perspectives on the community or organization can reveal useful patterns when paired with the stories they tell about it. You can ask questions like:

- How good of a job do you think ___ [is/are] doing with ___?
- What do you think ___ will be like in ten years? Why?
- Do people in ___ [listen to each other, cooperate, argue too much, etc]?
- If you want to ___, why is that? If you think about ___, why is that?
- What would you like to see happen in ___?

Roles and groups

Questions about roles and groups are useful when you want to look at differences among groups within a community or organization. Some of your questions of this type will be specific to the community or organization, and some will be more general. In a community, for example, you might ask:

- Do you belong to any of these community groups?
- Which of these hobbies are important to you?
- How often do you visit ___?
- Where do you get your ___?
- When you hear a rumor about ___, in which of these ways are you most likely to hear it?
- How long have you ___?

In an organization, you might ask:

- What is your position at ___?
- How long have you been at ___? How long in your current position? What did you do before that?
- Do you work alone or in a team? How large is your team?
- To what extent does your work depend on plans or requests made by other people?
- How predictable is your work? Do you do the same thing every day, or is every day different?
- To what extent would you describe your work as fast-paced?
- Do you supervise other people? If so, how many?

Habits and traits

Learning about each storyteller's personality and ways of thinking can help to put their stories into context. You can ask questions like:

- Are you a big-picture thinker? Or do you tend to wade into the details?

- Are you a careful person, or do you tend to be a little sloppy? How do you feel about that?
- Are you more of a glass-half-empty or glass-half-full person? Maybe somewhere in the middle?
- Does being around people energize or drain you?
- Do people often say that you think in strange or different ways? Or does that never happen to you?
- Do you love doing new things? Or do you do new things only when it's necessary?
- Which of these ways of learning works best for you?
- Do you tell a lot of stories? Or is that something you rarely do?

Demographics

Questions about demographics can reveal useful patterns when it comes to common influences on perspectives, such as generational differences. You can ask questions like:

- Which of these age ranges do you fall into?
- What is your ethnic background?
- Do you rent or own your home?
- Which of these living situations best describes yours?
- Do you live in a city, suburb, town, or village?
- What is your income?
- How much formal education have you received? How about informal education?

Be careful with factual questions. Build a strong case for each one you want to use. Why do you need that information? Could you ask the question in a less precise way that provides more anonymity? For example, if you want to know where people live, what is the largest geographical area you can ask them to describe?

When you are asking about demographics, include non-answer options like "I'm not sure" or "I'd rather not say." Also, make each question optional. Sometimes people don't want to say why they don't want to answer a question. In that case, let them say nothing at all.

Putting together your question set

The order in which you ask questions about stories can impact the quality and quality of stories you can collect. Here's the order that works best.

1. Start by asking your story-eliciting question(s).
2. After each story has been told, ask your follow-up questions about it.
    a) Start with emotional questions about the story. Emotions are most vivid just after a story has been told. Also, questions about emotions show that you care how people feel.
    b) Finish with factual questions. Up-front factual questions can come across as interrogatory. Later on, they seem clarifying, not judging.

3. After the person is done telling stories, ask them some questions about themselves. Never ask people about themselves before they start telling stories. It changes the stories they tell.
   a) Start with questions about views, because they are closest to the emotions of storytelling.
   b) Continue with questions about habits and roles.
   c) End with questions about demographics, which might seem intrusive earlier on.

Tips on building question sets

A set of questions about a story is half of a conversation you hope to have with people about the story.

Design an interesting experience

Use all three types of questions (free entry, choices, scales), and mix up their order. It makes for a more interesting experience, and it leads to a more interesting mix of graphs to use in sensemaking.

Design for skimming

Don't write questions that can't stand alone. People will skim them and misunderstand your meaning. Write each question and answer so it makes sense all by itself.

Design for clarity and ease of use

Grammatical and formatting mistakes on question forms slow people down, irritate them, and reduce their confidence in you. Don't waste your precious opportunity to gather their input. And make sure your forms are attractive. Show your participants that you put some energy into what you prepared for them. Give them something beautiful that will feel like an honor to use.

Design for feedback

In your question form, give people the time, space, and permission to make comments on your project and the form itself. Leave white space on a paper form; include a comment box on a web form; ask people for general comments in an interview. Let your participants help them shape the project so it helps everyone.

Testing your question set

Put your question set in front of as many of your potential participants, and as many people who know your potential participants well, as you can. Keep testing and improving your question set until people tell you that it is:

- Safe—not insulting or intimidating
- Interesting—an invitation to reflect
- Relevant—connected to real experiences
- Clear—free of contradictions or confusions
- Respectful—tactful and well presented

Gathering your stories

Each of the sections below gives you some basic instructions and tips on how to gather stories using that method. You are likely to depart from these simple plans as you grow your own unique PNI practice and draw on your own skills, background, and goals.

Conducting a one-on-one interview

Your interview script

Put together a script that adds to your prepared questions an overall introduction, transitions between interview parts (e.g., "now I have a few questions about you"), and a conclusion. Practice saying it until you no longer sound like you are reading from a script.

In your script, don't explain what makes a story a story. Nobody needs to know how their lungs work to breathe, and nobody needs to know what makes a story a story to tell a story.

In fact, it is best to avoid using the word "story" until your interviewee has told at least one story. Why? Because to most people today, "story" means "TV and movies" or "newspapers." It does not mean "things that have happened to me."

But you don't want people to audition for a TV show. You want them to reflect on their experiences. So as much as you can, keep "story" out of the conversation until after your interviewee has told at least one story. Then you can refer to what they have said as a story—and they will understand what you mean.

When you are ready, test your script by using it with a volunteer. After the interview, ask them to tell you about times when they felt confused, bored, challenged, intimidated, irritated, happy, hopeful, or grateful. Use what you learn to improve your script.

Starting out

Minutes	What to do	Notes
3	Introduce the project, put forth your win-win proposal, and explain your privacy policy.	Afterwards, turn on your recording device or prepare to take notes.
2	Say or show your story-eliciting question(s).	Give your interviewee a little time to take in the questions.

The main part of the interview

Minutes	What to do	Notes
5-10	Listen while they tell a story. If you want to, show them that you are listening by asking a respectfully curious question.	If they don't tell a story, guide them toward choosing and recounting an experience.
2-10	When the story is over, ask your follow-up questions, either in conversation or using a printed or online form.	Don't let them linger over the questions; keep them moving.
?	Repeat this process—ask or choose a story-eliciting question, tell a story, answer questions about it—until five minutes are left in the agreed time.	If they depart from the story-eliciting questions, let them—as long as they keep telling stories.

Finishing up

Minutes	What to do	Notes
3-5	Ask them to answer your questions about themselves.	
1	Thank them for their time and tell them how they can join the sensemaking part of the project.	

Tips on conducting one-on-one interviews

Go on a story-listening journey

Listen past the story you thought they would tell, the story you want them to tell, and the story they should tell. Keep listening until you get to the story they are actually telling.

Notice what type of storyteller you are talking to

Some people tell lots of stories, and some don't. Some people *think* they tell lots of stories, and some don't. These differences combine to create four types of storytellers. Each one requires a different interviewing approach.

- **Natural storytellers** tell lots of stories, but they have no idea they are doing it. That's fine. You don't need people to *know* they are telling stories. You just need them to tell stories. Give them permission to speak freely. That's all they will need.
- **Story performers** tell lots of stories—and know it. They can't help focusing on the performative act of storytelling. It's familiar and fun, and they get carried away, forgetting what you asked about. Keep guiding them back to what actually happened to them—and away from what makes the best story.
- **Confident non-story tellers** *think* they tell lots of stories, but in truth they mostly express opinions. Keep guiding them back to their own experiences. Ask, "Can you remember a specific time when you felt that way?"

- **Unaccustomed storytellers** tell few stories and know it. It's just not the way they think. But they *can* tell useful stories. They just need a little help. Ask them questions that draw out the story, like "What happened next?" and "How did that feel?"

Help people turn half-stories into full stories

When you ask people to tell stories, they often respond with three types of not-quite-stories. You can help people turn half-stories into real (and really useful) stories.

- A **situation** is a snapshot, a description of a state of affairs at a moment in time. It's not a story because nothing changes and nothing is resolved. When you recognize a situation, ask: What happened after that? How did things turn out?
- A **scenario** is a generalized plot that summarizes many similar experiences. No particular events are recounted. When someone describes a scenario, ask: Can you remember a specific time (or moment or day) when that happened?
- A **reference** is a hint at a story that everyone knows (or no one knows). The actual story is left untold. When you hear a reference, ask: Could you tell me more about what happened?

Help people turn simple stories into complex stories

Some stories are naturally simple because they are about uncomplicated things. Some stories are purposefully simplified in order to communicate or persuade with clarity. And some stories are complex because they combine many messages and purposes. Complex stories work best in PNI.

To help people turn simple stories in complex stories, ask them questions like:

- How did that feel? What surprised you about it? What did you learn from it?
- Does this remind you of any other times when you felt the same way? How about when you felt the opposite?
- Why do you think that person responded in the way they did?
- If this story had taken place in another place or at another time, what would be the same, and what would be different?
- How do you think ___ would tell this story if they were telling it right now?

If you think a respectfully curious question will help someone explore an experience more deeply, you can ask it even if it is not in your interview script.

Convert your interview to a useful transcription

For privacy reasons, most story projects transcribe their audio recordings. But because storytelling is a performance and a negotiation, transcribing conversational storytelling is not the same as transcribing other kinds of conversations. Here are some things to pay attention to as you prepare your transcriptions.

- **Capture a storytelling event, not just a story.** Don't start transcribing when the events of the story begin; start transcribing when the storytelling event begins. If you can, include the abstract, the story proper, its coda, and any relevant follow-up conversation. This will usually only be a few extra sentences, but don't leave them out.

- **Preserve emphasis.** During a storytelling event, emphases communicate intent and meaning. Capture *how* people tell their stories, not just the words they use. Mark words said with greater intensity using italics.
- **Catch hesitations and reframings.** Breaks, irregularities, hesitations, repetitions, and confusions can be important indicators of negotiations during a storytelling event. Keep these things intact as much as you can.
- **Make it make sense.** People often talk in bits and pieces, starting and stopping. You can capture these nuances without making your transcript impossible to read. Use punctuation (commas, semicolons, colons, dashes) to represent halting speech in complete sentences.
- **Capture socially significant sounds.** Most transcripts ignore background noises like laughter, muttering, the sound of shuffling feet, and silence. But when someone is telling a story, such social cues can be useful indications of what is going on. Simple notations such as [laughter] and [pause] and [long silence] can help to capture these cues.
- **Capture non-textual signals.** Descriptive notes can help to preserve meanings that are obvious in conversation and impossible to detect in text. For example, mark obvious instances of sarcasm and irony, and make a special note when people use reported speech to represent a story character.

Take care of yourself

Story work is emotional labor. If you are doing a lot of interviews, you may start to feel burned out. Don't wait until your flagging energy starts to influence the stories you collect. Pace yourself with breaks. If some parts of the work are especially hard for you, seek support or help.

Listen for gratitude

How can you tell if you're doing this work right? People will thank you. Once in a while, somebody will notice what you are doing, appreciate it, and tell you. If that never happens, your project needs more work.

Conducting a group interview

A group interview is a guided conversation between yourself and 2-5 project participants.

Your interview script

In a group interview, you will be talking to more than one person, so people won't feel socially obliged to respond to your questions right away. So your script will need to get things moving as quickly as you can. The best way to do this is to *embed a self-fulfilling prophecy* into your introduction. Say something like:

> When people get together, they often tell stories about their experiences. We're going to do that now, only we're going to be a little bit more deliberate about it by starting with these questions.

If you say this with confidence, people will believe you that stories will flow, and *stories will flow*. You will have to say the word "story," so watch to make sure people understand

what you mean by the word. Keep leading them back to exploring and reflecting on their experiences with your topic.

Starting the interview

Minutes	What to do	Notes
5	Introduce the project, put forth your win-win proposal, and explain your privacy policy.	Practice this until it fits into the time.
2	Give everyone an anonymous identifier, like a number, letter, animal, or any other unique thing.	Ask people to write this down, or write it down yourself. Also turn on your recording device or prepare to take notes.
2	Say or show your story-eliciting question(s).	Give people some time to take in the question(s).
5-10	Listen while someone tells a story. Show that you are listening by asking at least one respectfully curious question.	If the person doesn't tell a story, guide them toward choosing and recounting an experience.

After the first story has been told

Minutes	What to do	Notes
1	Ask the storyteller to give the story a name.	Write down the name and the storyteller's identifier.
?	Repeat this process—tell a story, give it a name, write it down—until 10-15 minutes are left in the agreed time.	After the first story has been told, give everyone the additional option of telling a story in response to a story they heard.

If there is a lull in the conversation, wait a while to see if it resolves itself. If it doesn't, help people build a connection to a new story by pointing out something in a story and asking if anyone has had a similar or different experience. *Don't ask people to take turns* telling stories—let them flow naturally—and don't pressure anyone to tell a story.

Finishing up

Minutes	What to do
5-10	Give everyone the names of the stories they told and ask them to answer your follow-up questions about each story, using a printed or online form.
3-5	Ask everyone to answer your questions about themselves.
1	Thank everyone for their time and tell them how they can join the sensemaking part of the project.

Tips on conducting group interviews

Use what you have learned about conversational storytelling to help people share stories during your interview.

- When you recognize a story abstract, you can know that the person who gave it may not feel sure that they have permission to tell a story. Make it clear that they have permission by looking at them in a listening sort of way or by saying something like "I'd like to hear about it."
- When you recognize an evaluation statement, you can know that the storyteller cares about that part of their story and needs someone to pay attention to it. Make sure they know that you are attending.
- When you recognize a story coda, you've found a good place to encourage the teller (and everyone else) to tell more stories by saying something to reinforce the story's validity. Say something appreciative ("That's interesting") or summarizing ("So you left that day?") or questioning ("Why do you think they said that?") or grateful ("Thank you for telling us about that"). But don't say "Thank you for that story." It will bring up the idea that a story is a possession, which will make everyone more reluctant to speak.

Setting up peer interviews

Peer interviews are easy to set up. Just develop an interview script, give it to your participants, and ask them to interview each other and send you the result. Because each pair or trio will be able to decide what they want to share with the project and what they want to keep between them, you could say that peer interviews create many tiny projects nested within your main project.

However, peer interviews won't work for every project. They require more effort on the part of participants, so they won't work if your participants aren't motivated to participate. Also, because you can't be there at the interviews, you can't guide people towards telling stories. You might think you can circumvent this outcome by including an explanation of how story sharing works in the interview script; but if you do that, you run the risk of gathering performative, is-this-good-enough stories.

The only way you can make sure that peer interviews will gather the stories you need is to spend extra time testing and refining your peer interview script. Ask a few pairs or trios

to use it while you record them. Then listen carefully to their conversations. You want to hear signs of relaxed ownership, in which people understand the task and tell meaningful stories in response. You don't want to hear meta-discussions ("What are we supposed to be doing?") or pregnant pauses (they don't tell the stories they seem to want to tell).

When your script is ready, match people up (ask them to find each other; ask each person to find another person or two; match them up yourself). Then give each pair or trio your interview script and ask them to submit their response by sending (or handing) back an audio recorder, visiting a recording booth, calling a phone line, using a web site or smartphone application, or sending an email.

Setting up surveys

Surveys are very easy to set up, almost deceptively easy. All you have to do is build a question set, convert it into a printed or online form, send out an invitation, and wait for the stories to come in. If your ambitions are modest, a survey may be all you need. Keep in mind, however, that:

- Survey responses rates are usually low (around five percent)
- Surveys tend to collect more non-story responses (like opinions)
- Survey stories are usually less relevant and meaningful than stories told in conversation

This doesn't mean you can't use surveys in PNI. But it does mean that you should not expect to reach the same depth of meaning with a survey as you would if you were gathering stories in real conversations.

Having said that, surveys are the best choice when you have only tiny crumbs of participation to work with. If you can only count on five minutes of your participants' time and attention, a survey may be your only option. In that case, the good news is that the more you test and improve your survey, the better stories and answers you will gather.

Inviting people to take your survey

When you invite people to take your survey, whether it's in an email, on a website, or on a sign above a stack of survey forms, anticipate their questions and answer them clearly and unambiguously.

Question	Example answer
Is this for me?	We are reaching out to everyone [in/with] ___, and that includes you.
Am I qualified to do this?	If you have ___ for at least ___, this survey is for you.
Why ask me?	Hearing about your experiences with ___ will help us make ___ better.
What's in it for me?	By participating, you will be able to ___.
Will I be in control?	We want to hear whatever you want to tell us about ___.

Writing the survey

The questions in your narrative survey should follow a simple sequence:

1. Start with a brief introduction that explains the project and its goals, puts forth your win-win proposal, explains how the collected stories will be used, and sums up your privacy policy (with a link to more information).
2. Ask your story-eliciting question(s). If you have more than one, ask the participant to choose a question to answer.
3. Give the participant a nice big text box to write their story in.
4. Ask them to give the story a name you can use to refer to it later.
5. Ask your questions about the story.
6. Ask if they would like to tell another story. If they do, repeat steps 2-4.
7. Ask your questions about the participant.
8. Thank them for their time and tell them how they can join the sensemaking part of the project.

By the way, if you're using a web survey, don't break it up into multiple pages. Keep the whole survey together. Why? Because people need to understand the context in which you are asking them to tell a story. Your follow-up questions will help them understand what sort of story you want them to tell, and how, and why. Breaking up a narrative survey onto multiple pages, especially if the story is on a different page than your follow-up questions about it, will result in the collection of less relevant and meaningful stories.

Gathering energy for your survey

If your first survey invitation gets you all the stories you need, that's great! But it's not what usually happens. You will probably need to ask people to participate at least twice, and maybe three or four times. In your later invitations, include a few attention-grabbing excerpts that communicate a sense of rising excitement. Peer pressure and the fear of missing out are social forces you can draw on to help people feel ready to contribute. Don't plead with people or try to guilt them into participating. But do tell them that something special is going on.

What to do if nobody responds

Let's say you have built your survey, tested it, told everyone about it, did your best to gather energy for it, and still got little or no response. What can you do? Reach out to some people who received your invitation but didn't reply to it. Ask them to help you understand what you did wrong. Ask them:

- Did the survey fail to get your attention? What would get your attention?
- Are you too busy to do this? Would a shorter survey work better for you? Or is there a better time to reach you?
- Do you think the survey does not apply to you? Who do you think it applies to? What sort of survey would apply to you?
- Are you not interested in this topic or project? What topic or project would be interesting to you?
- Do you have a specific concern? What do you think would address it?
- Would you rather not talk about this topic in a survey? How would you like to talk about it?

Based on what those people tell you, think about how you could reboot your project to reach them where they are.

Getting journals started

A journal (or diary) is basically a survey people fill out more than once. You can ask your participants to write in their journals on a periodic basis, say once per week, or you can ask them to add an entry when something happens that is important to the project, like every time they remember a dream.

This is an intensive form of participation. Don't use it unless you know exactly who is going to be participating in your project, and unless you have already talked to them about what they are willing and able to do. Even after you have negotiated how often and how long people will write in their journals, be prepared for them to lose interest sooner than they thought they would.

There are a few things you can do to keep your participants' interest alive throughout their journaling experience.

- If the journals will be periodic, you can explore a new aspect of your topic, or ask a new story-eliciting question, in each time period. You can also add new (maybe deeper) follow-up questions as the journaling period goes on.
- If the journals will be episodic, you can include some questions about what stands out about each particular incident, and you can include optional questions that pertain to some types of incidents and not others.

In other words, the more journaling feels like building a diverse and interesting collection of memories and thoughts, the less it will feel like doing the same thing over and over, and the better people will take to it.

Another way to keep people engaged in journaling is to show them what they are building. You can periodically send them meaningful snippets drawn from all of the journal entries coming in, and you can show them patterns that are emerging from the data. Seeing a story collection begin to take shape can help participants find the time and energy to keep supporting the project.

Setting up narrative incident accounts

A narrative incident account is like a journal, except for two things: people only fill it out when they have just seen something happen, and people use it to describe things that happened to other people as well as (or instead of) to themselves.

Narrative incident accounts are not likely to be the only paperwork your participants will be asked to fill out when something happens. They will probably also be asked to answer some factual questions about the incident.

NIAs are about perspectives, not facts. The purpose of a NIA is to put some meat on the bones of an incident by asking the people who saw it happen to recount it *as a story*, and then to reflect on the story they told. So when you are building your NIA form, think about how you can complement the questions people are already being asked. For example:

- If people are being asked to describe what happened, you could ask them what surprised them about what happened, or what they think should have happened, or how often they've seen that sort of thing happen in the past.
- If people are being asked to categorize the people involved in the incident, you could ask them if they noticed anything particular about these particular people or about their behavior.
- If they are being asked what time of day the incident took place, you could ask them if there was anything about the time of day that they think might have had an impact on what happened.

Make sure your participants understand that in the NIA—and only in the NIA—they are allowed to express their feelings, perceptions, and speculations about the incident. They don't have to stick to the facts.

To avoid confusion, separate the two contexts in some way. For example, you might use different styling on your NIA form, or you might use a different mode of collection (say audio instead of text) to signal a change from reporting to recounting.

One of the best ways to use a NIA is to ask everyone involved in an incident to fill out one. It's rare that you can manage this, but when you can, the patterns that emerge can be enlightening.

Facilitating story-sharing sessions

In a story-sharing session, as in a peer interview, participants share stories with each other, but not with you. Your role is to set up the conversation, then step back and stay out of it.

Allocate 1-2 hours, invite 3-30 people, and follow these instructions.

Preparing for story sharing

A successful story-sharing session relies on an environment conducive to story sharing. Do what you can to create it.

- Bring the right people together. Create conversations in which people feel safe to speak freely, yet also invited, encouraged, inspired, and even a little challenged to step up and play a part in making the project a success.
  - Invite groups with different power levels to separate story-sharing sessions.
  - Within those groups, think about how you can bring people together in ways that will blend safety with just the right amount of challenge. Create conversations in which stories will flow.
- Find a space that feels large enough to share stories in.
  - If you will be meeting in person, find a large, quiet, calm room where small groups of participants can move around and get some distance from other groups, both acoustically and socially.
  - If you will be meeting online, find a tool that provides reliability, widespread connectivity, ease of use, breakout rooms, and screen sharing.
- Set up a café-like social atmosphere.
  - If you will be meeting in person, provide drinks and snacks, and prepare to play some quiet music when groups are engaged in conversation.
  - If you will be meeting online, plan to start the meeting with a friendly check-in ritual that helps everyone feel seen and heard. Use a small gift voucher to set up a tone of pleasant celebration. And work on the rituals you will use to send people into breakout rooms, remind them of time constraints, and bring them back together again.
- Choose a small-group formation strategy that will bring out the stories you need to collect in a way that will feel safe and respectful to your participants. How would they respond if you told them which small group to join? What if you asked them to play a matching game (like “find two people with other favorite colors”)? What if you asked them to choose a group without any other instruction? Would those groups bring out the stories you need?

Starting out

Minutes	What to do	Notes
5	Introduce the project, put forth your win-win proposal, and explain your privacy policy. Include a self-fulfilling prophecy about how people naturally tell stories when they get together.	Practice this until it fits into the time.
2	Give everyone an anonymous identifier, like a number, letter, animal, or any other unique thing.	Ask people to write this down, or write it down yourself.
2-5	If you have more than five people, form small groups of 3-5 people.	Story sharing works better in trios than in pairs.
2	Set up a way to record the stories told in each small group, using technology and helpers.	

The exercise

Minutes	What to do	Notes
40-90	Facilitate a story-sharing task or exercise. Your options here vary from a single, simple instruction to a complex game-like activity. (Details are in Chapter Six.)	After each story is told, ask people to write down its name and teller. At some point (depending on the task or exercise), ask everyone to answer your follow-up questions, using a printed or online form.

While the exercise is going on, promote participant ownership with light-touch facilitation. That is, help your participants own what they do by giving them as much help as they need, and no more. Some tips:

- **Let them go.** Communicate a message of empowerment and freedom to work independently of your direction. Provide a brief but clear session agenda, and make sure groups can check it without having to ask for help. When people are working in their small groups, speak quietly (and maybe play some quiet music) to signify that you have withdrawn your attention for a reason.
- **Keep your distance.** Don't let reluctant or under-confident participants turn the session into a group interview. Gently push the responsibility and the ownership of the session back to them. If they want an example of the type of story they should tell, don't give to them; just rephrase your exercise instructions. If they ask detailed questions, answer one or two, then tell them they are free to interpret the instructions as they like.

- **Watch from afar.** Keep an eye what people are doing, but don't intervene unless they aren't sharing stories. You can tell when people are sharing stories because one person will be moving and speaking, and everyone else will be still and silent. (You can even see this online, if you can see what people's cursors are doing.)
  - If a group is not sharing stories, and they seem bored, suspicious, or annoyed, leave them alone. Poking them will just make things worse.
  - If a group seems engaged but isn't telling stories, quietly ask them a fake-innocent question like "Just checking, did you get the handout? By the way, how's it going? Lots of stories coming up?" that actually serves to remind them of what they are supposed to be doing.

Finishing up

Minutes	What to do
2-5	Ask everyone to answer your questions about themselves.
1	Thank everyone for their time and tell them how they can join the sensemaking part of the project.
5-10	If people seem to want it, have a short after-party, with a general discussion about the topic.

Gleaning stories from conversations

If you have access to a body of recorded conversations in which people talked about the topic you want to explore in your project, you can use the stories from those conversations (if there are any) in sensemaking, alongside the stories you collect from your project participants. To find stories in transcripts, look for four reliable indicators that a story is being told in a conversation.

1. Look for personal pronouns, like I, you, he, she, we, they. When people are describing facts or giving opinions, they use these words less often.
2. Look for past-tense verbs, like "did" or "said" or "tried."
3. Look for time references, like "when" or "then" or "afterward," or "morning" or evening" or "day."
4. Look for storytelling words, like "happened" or "one time" or "back in the day" or "I remember."

Chapter 6

Group Exercises for Story Collection

This chapter explains how to carry out seven group exercises you can use to gather stories in your project. Each of them is described in more detail in *Working with Stories*.

Twice-told stories

This is the easiest of the exercises in this book, and that makes it a good exercise to start with. But its requirement of at least six participants is critical to its success.

Requirements

At least six people; at least an hour.

Preparation

Get your agenda and story-eliciting question(s) ready to use: print them, get ready to write them on a whiteboard, or prepare a document to screen share.

Starting out

Minutes	Who	What to do
2	You	Briefly explain what will happen in the exercise.
2	You	Set up *at least 2 groups* of 3-4 people.
1	You	Read or show your story-eliciting question(s). Explain that each group will use the questions to start their story sharing.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Note: In this table (and all similar ones), when the “who” column does not say “you,” the instructions are for your participants. Give them the instructions in your own words.

Minutes	Who	What to do
25+	Small groups	Answer the questions the facilitator gave you. As you share experiences, give each story you tell a name. Write it down and say it on the recording. Also note who told which story.
5	Small groups	Talk about the stories you just told. Choose one story to tell again to everyone in the session.

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	Someone (anyone) from each group, tell the story you chose. Then talk about all of the stories and what they mean.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

When you ask people to use to choose a story to retell, instead of asking in a general way, you can ask them to use a story-selection question that connects to the goals of your project, like "Which story shows what ___ is really like?" Don't choose a question based on a general quality like "the most memorable story." Quality-based questions bring out performative storytelling, not generative story sharing.

Timelines

This exercise works well when there is at least one clear, meaningful, and relevant time sequence that your participants will want to tell stories about. It can be a shared history (like "The past ten years of our support group") or a commonly experienced series of events (like "A visit to the dentist"). If your topic has no such time sequence, use a different exercise.

Requirements

At least three people; at least 90 minutes.

Preparation

Before the session, think of start and end labels for a timespan along which you want people to recount their experiences. If you think your participants would like a choice, come up with two or three timespans, each with its own start and end labels.

Also get your agenda and story-eliciting question(s) ready to use: print them, get ready to write them on a whiteboard, or prepare a document to screen share.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than three people, split up into groups of 2-4 people.
1	You	Give or show everyone story-eliciting questions.
1-5	You	Give or show everyone your time-frame end labels (or choices).
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Minutes	Who	What to do
5	Small groups	Draw a horizontal line across your space. Then look at (or choose among) the time-frame labels you were given by the facilitator. Place the labels at the start and end of your horizontal line. Add to each label a few more sticky notes that describe what that time was (or is) like, in general.
45+	Small groups	Now look at the story-eliciting questions you were given by the facilitator. When you think of an answer to a question, tell it to the other people in your group. Then give the story you told a name, write it on a sticky note, and place it where it belongs on the timeline. As you work, notice any patterns (including blank spaces) in your timeline. Do those patterns bring any other experiences to mind? Make sure everyone has a chance to share a story (or not, as they choose). Keep sharing stories until the time runs out.
5	Small groups	Talk about the patterns you see in your timeline. What do you think they mean?

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	If you have more than one group, have someone from each group describe their timeline. Then talk about the patterns you see across all of the timelines.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

This exercise can be very simple, but it can also be quite complex. These are some elaborations you can add.

- You can ask the people in each group to choose their own start and end dates, and maybe their own subtopic (within your overall topic).
- You can ask people to add turning points to their timelines—times when important things happened, like crises, discoveries, conflicts, resolutions—and see if the turning points bring more stories to mind.
- You can ask people to move their stories up and down into a second dimension of meaning (like "we need more/less of this"). They can then think of stories that fit into the gaps that appear in the (now two-dimensional) space.

Landscapes

This exercise is useful in situations where you can't think of any time sequences that will draw out stories, but you can easily come up with some dimensions of variation along which stories are likely to differ in meaningful ways. For example, if your project is about trust, it would make sense to explore stories that vary from weak to strong trust.

Requirements

At least three people; at least 90 minutes. Spaces to work on; sticky notes.

Preparation

Look at your questions and draw from them pairs of dimensions that are meaningful (they matter to your topic), evocative (they will bring stories to mind), variable (stories will range across them), and independent (not correlated). Each dimension should go from something to something, like "Trust: from absent to complete" or "Predictability: from clockwork to chaos." Think of gradients, not categories. You want your participants to explore nuanced comparisons.

You can prepare 2-4 dimension pairs and ask each small group to choose a pair to work with, or you can prepare just one pair.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than three people, split up into groups of 3-5 people.
1	You	Give or show everyone your story-eliciting question(s).
1-5	You	Give or show everyone your dimension labels (or choices of labels). Also give each group its own wall, table, giant piece of paper, or online whiteboard to work on.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Minutes	Who	What to do
5	Small groups	If you are working in person, mark out a space of about one square meter, on a wall, table, or giant piece of paper. If you are working online, draw a box that takes up most of a page. Using the dimension names you were given (or chose), label the two dimensions (horizontal and vertical) of your space with sticky notes. Also label each corner of the space with a sticky note that describes the space at that corner (e.g., “High trust, low predictability”).
45+	Small groups	Look at the question(s) you were given. When you think of an answer to a question, tell it to the other people in your group. Then give the story you told a name, write it on a sticky note, and *place it where it belongs* on your space. As you work, notice any patterns (including blank spaces) in your landscape. Do those patterns bring any other experiences to mind? Can you fill up every blank space? Make sure everyone has a chance to share a story (or not, as they choose). Keep sharing stories until the time runs out.
5	Small groups	Talk about the patterns you see in your landscape. What do you think they mean?

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	If you have more than one group, have someone from each group describe their landscape. Then talk about the patterns you see across all of the landscapes.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

Another way to do this exercise is one dimension at a time. Start with just the horizontal dimension, asking people to think of experiences that happened along it. Then, once they have filled up that (linear) space, add a second dimension. Ask people to move the stories they already told to where they belong vertically. Then ask them to sit back, look at the two-dimensional space they have created, and see if more stories come to mind.

Local folk tales

This is a special type of landscape exercise that helps people talk about the place where likelihood and longing come together—that is, when what is *likely* to happen collides with what people *want* to happen (and don't want to happen). I call this a "local folk tales" exercise because:

- Exploring the confluence of likelihood and longing is why we tell folk tales.
- Every team, family, community, and organization has its own set of folk tales, which they use for exactly this purpose.

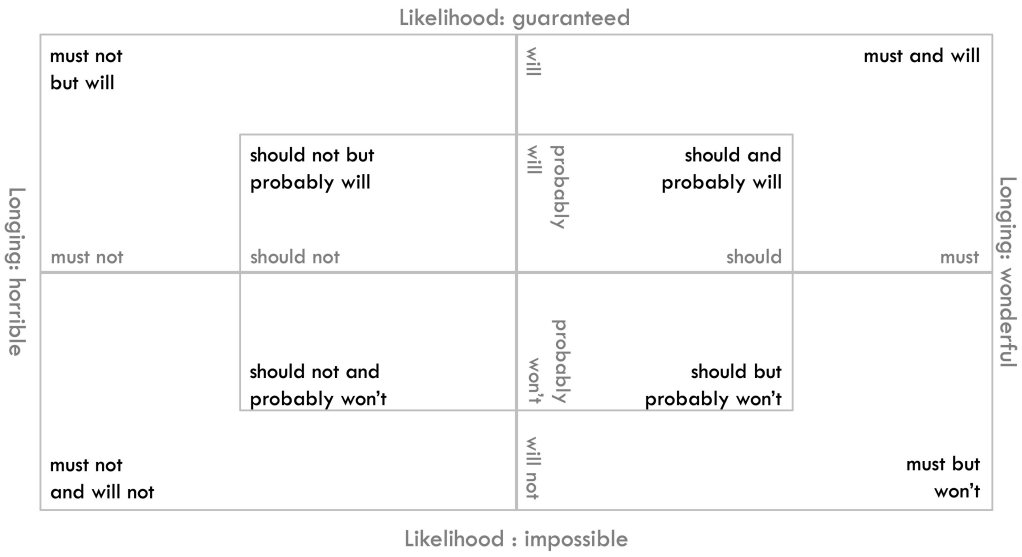
You can use this exercise to draw out those stories.

Requirements

At least three people; at least 90 minutes.

Preparation

Write or print the following diagram on poster-sized sheets of paper or full-page online documents, one per small group. Write or print its lines and words in small, light fonts (smaller and lighter than I can use here). People will be working on top of the diagram, so it should fade into the background of the space.



This exercise does not use or require story-eliciting questions, though you can have them on hand to help people think of stories to tell if they're struggling.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise. Show people the diagram.
2-5	You	If you have more than three people, split up into groups of 3-4 people.
1-5	You	Give or show everyone the local-folk-tales diagram. Also give each group its own wall, table, giant piece of paper, or online whiteboard to work on.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Minutes	Who	What to do
45+	Small groups	Look at the diagram. Think of *times you remember that match the labels* on the space (with respect to the topic of the project). For example, in the upper left-hand corner, think of times when something happened that "must not but will" happen again. Share these stories with each other. Working together, see if you can think of a few stories that match each of the labels on the diagram. After each story has been told, give it a name. Write the story name on the diagram (or on a sticky note stuck to it), and say the name on the recording. Make sure everyone has a chance to share a story (if they want to).
10+	Small groups	Talk about the patterns you see in your space. What do you think they mean?

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	If you have more than one group, have someone from each group describe the stories in their space. Then talk about the patterns you see across all of the spaces.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

This exercise can be an emotional one, and people might not always agree on whether what happened in a story should happen again or not. If disputes come up, tell people that if they can't agree on where a story fits, they can put it in both places. They can make two copies of the sticky note, and on each note, write why they placed that interpretation of the story where they did.

Ground truthing

This exercise gathers stories about, around, and against an official document of some sort, usually a mission or values statement. You can also use it with a set of definitions drawn from a dictionary.

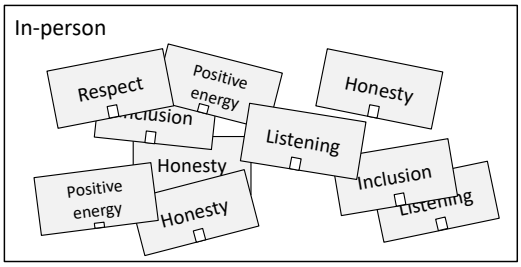
Requirements

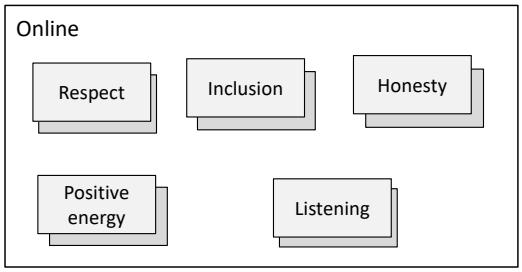
At least six people; at least 90 minutes. An official document or set of dictionary definitions that relates to your project's goals.

Preparation

If you are working with an official document, break it up into 10-20 sections, each of which covers one concept or statement. Give each section a brief descriptive name, like "Honesty" or "Diligence." If you are working with a dictionary, choose 10-20 terms that matter to your project.

If you will be meeting in person, print each section or definition on a sheet of paper, fold it in half, tape it shut, and write its name on the outside. If you will be meeting online, create a document with hidden elements so that only the names of the texts can be seen (at first).





Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise. Show people the document/dictionary and the papers on the table (or items on the screen). Ask people not to open the papers/items until you tell them to.
2	Each person separately	Look over the papers on the table (or items on the screen). Choose one you find interesting. Take it back to your seat (or copy it to your own document, or just remember it). *Do not open it* (or do what it would take to "open" it online).
5	Each person separately	Look at the word(s) on the paper (item) you chose. Think of a time when that/those word(s) mattered to you. Remember what happened at that time.
2-5	You	If you have more than three people, split up into groups of 3-4 people.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Minutes	Who	What to do
45+	Small groups	• One person at a time: Tell what happened at the time you thought of, the time when the words on the paper (screen) mattered to you. – One listener: Jot down any *beliefs* you hear in the story. – The other listener: Jot down any *values* you hear in the story. • After the story is over, both listeners, report back on what you heard, with respect and without judgement. • Open the sheet of paper (item on the screen) and read what it says inside. Discuss any connections or gaps you see between the story, the beliefs and values you heard in it, and what it says on the paper (screen). Repeat this process until each person has told one story (if they want to). If you have extra time, choose more papers (screen items) and go through the process again.

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	If you have more than one group, have someone from each group describe what happened in their work together. Then talk about the patterns you see across all of the groups.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

The default story aspects for this exercise are beliefs and values, but you can use any set of two aspects people are likely to find in most stories: emotions, conflicts, perspectives, problems, solutions, dilemmas, discoveries, helping hands, and so on. Choose aspects that matter to your participants and your topic.

After each small group has discussed the connections and gaps between the story they told and the statement or definition they read, you can ask them to *rewrite* the statement or definition in light of the story. Then, when everyone comes back together at the end of the session, each group can choose one rewritten item to tell about. (Just be careful not to pretend that you will actually be changing any official documents.)

A story-sharing game

You can ask people to share stories by asking them to *play an actual game* with each other. Games shake things up and surprise people with unexpected juxtapositions. That makes them a good option when you want to explore a topic that has already been discussed at length. A game is not a good option, however, if you have a sensitive topic. In that case it could seem like an insult.

Requirements

At least three people; at least 90 minutes; a story-sharing game.

Preparation

Find a game that encourages (or at least allows) its players to tell stories:

- about things that actually happened
- in response to other stories
- because they matter to their tellers
- naturally, as they come to mind
- without ranking, rating, or any other kind of judgment

You can use any game that has these features. Some options are (my own game) Narratopia (which you can download from narratopia.com), Rory's Story Cubes, Rememory, and some ice-breaker games ("Have you ever/never," "Two true stories and a tall tale"). You might need to bend the game's rules or tweak its materials to make it work, but you can do that. You might be able to embed your story-eliciting questions into the game, but if you can't, just ask people to keep them in mind as they play.

If you will be meeting in person, buy or print as many copies of the game as you will need for the number of people you expect to attend the session. If you will be meeting online, create virtual versions of the game's elements and place them on as many separate whiteboards as you will need.

Starting out

Minutes	Who	What to do
3	You	Introduce the game.
3	You	If there are more people than can play the game, split up into groups, each with their own copy of the game. If the game requires a surface, make sure each group has its own.
1	You	If your story-eliciting question(s) are not embedded in the game you chose, read or show them, asking people to keep them in mind (and in sight) as they play the game.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

The main part of the exercise

Minutes	Who	What to do
45+	Small groups	Play the game, following the instructions and using the materials you were given by the facilitator.
5	Small groups	If there is more than one group, quickly look back over the stories you told in the game and choose one story you want to tell to the whole session.

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	If there is more than one group, tell the story you chose.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

You can also use a story-sharing game as a peer interview script. You can give it to groups of people and ask them to play it on their own, then send you a recording of their play session (or as much of it as they want to share). Just make sure to ask them to answer your questions about the stories they tell.

Story-ended questions workshop

This is not really an exercise; it's an educational workshop I created to help people learn about story sharing. But it makes a great up-front on-boarding exercise when your participants have expressed an interest in learning how to work with stories. Don't use it if you don't know who your participants will be, if they don't trust you, or if you aren't *certain* that they are interested in learning more about working with stories.

Requirements

At least three people; at least 90 minutes.

Preparation

1. Go to Chapter 2 of this book and review the section called "Stories and conversations" (page 8). Use what it says there to create your own five-minute presentation on how stories play out in conversations (abstracts, evaluation, codas).

2. Go to Chapter 5 of this book and review the section called "Asking questions about stories" (page 42). Again, prepare a five-minute presentation about why people ask questions about stories. Include an explanation of the difference between open-ended, closed-ended, and story-ended questions (page 40).
3. Prepare a few example questions (story-eliciting and follow-up) for each of the three reasons people ask questions (because a story is a message, a thinking tool, and a connection). You can use your actual story-eliciting questions for this (and maybe use the exercise to test them), or you can use general questions.

Practice each of these presentations until they fit nicely into five minutes each. You might also want to prepare a simple, clear, one-page handout that summarizes both presentations.

Starting out

Minutes	Who	What to do
1	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than three people, split up into groups of 3-4 people.
1	You	Start a separate recording device for each small group, or ask each group to tolerate the presence of a note-taker.

Asking story-ended questions

Minutes	Who	What to do
5	You	Give the first part of your prepared presentation, the part on the iceberg model. Ask people to save their questions about it for later.
1+	Small groups	Choose one person to take on each of three roles: interviewer, storyteller, and observer.
20+	Small groups	• Interviewer: Ask a story-ended question, one that is related to the topic of the project. • Storyteller: Answer the question. • Observer: Listen, notice, and report back on what you noticed about the way the story played out in the conversation. Then rotate the roles and do this twice more, so everybody gets to tell a story. If you run out of time, don't worry; there will be another chance to tell stories later.
10+	Everyone together	Talk about what happened in your small group interactions. (If there are any questions about the introductory presentation, ask them now.)

Asking questions about stories

Minutes	Who	What to do
5	You	Give the second part of your prepared presentation, the part on asking questions about stories.
20+	Small groups	• Interviewer: Ask a story-ended question related to the project. • Storyteller: Answer the question. • Interviewer: Ask a question or two about the story. • Storyteller: Answer the question(s). • Observer: Listen, notice, and report back on what you saw. Then rotate the roles and repeat the process.
10+	Everyone together	Talk about what happened in your small group interactions.

Finishing up

Minutes	Who	What to do
5-10	Each person separately	Answer questions about each story you told and about yourself.
10+	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

If your participants are especially interested in this workshop, you can add an elaboration. When the interviewer asks the story-ended question, the storyteller can *try to answer the question without telling a story*. The interviewer should keep reframing the question until the storyteller can't help but tell a story. Motivated people find this a fascinating challenge; it helps them to practice drawing out stories. But don't use it unless people are truly motivated to learn; otherwise it will just be annoying.

General notes on these exercises

Feel free to experiment with these exercises and adapt them to suit the unique needs of your projects and participants. I like these names for them, but you can call them anything you want. Also, this is not an exhaustive list. Many approaches to participatory group work include exercises similar to these. Avoid exercises that ask people to compete, rate, rank, or criticize. Seek out exercises that encourage people to listen with respect. Within those constraints, any exercise that helps people share stories in an atmosphere of safe exploration can help you gather stories for your project.

Chapter 7

Narrative Catalysis

Narrative catalysis is a process in which you work with a set of stories and answers to build *catalytic material* for participatory sensemaking. Catalysis uses many of the same tools as analysis, but with an opposite goal: to support participatory discussion.

In analysis:	In catalysis:
Answers (findings, conclusions) are definitively *presented* by people in positions of authority.	Questions (puzzles, perplexities) are constructively *provided* by project participants and/or facilitators.
They are passively *absorbed*, usually by individuals.	They are actively and playfully *explored* by groups of people working together.
They are sometimes *accepted* and sometimes *attacked*.	They are always *challenged*.

When to use catalysis

There are some situations in which catalysis is especially useful.

- *You want to get to the heart of an issue*. Catalytic material can help your participants dive deeper into your topic.
- *Your story collection is large*. If you have more than 200 stories, catalytic material can help your participants get a better sense of what people had to say.
- *You need new ideas*. Catalytic material can bring a breath of fresh air to "been there done that" situations.
- *Someone needs to say what can't be said*. Catalytic material can help people break through social taboos that make it hard to talk about a topic in public.
- *People won't take your stories seriously*. People who think of stories as "only anecdotal evidence" might be more willing to work with catalytic material.

When not to use catalysis

Catalysis is an optional part of PNI. Many successful PNI projects do not include it. It might not be right for your project.

- *Your project may not need it*. If your topic is straightforward, your story collection is small, and your participants are ready and willing to work directly with your stories, you may not need this part of PNI.
- *Your data may not support it*. To use catalysis you need at least 100 stories, and they must be relevant and meaningful. You also must have asked at least a few follow-up questions about each story, and those answers must also be relevant and meaningful.
- *You may not be ready for it*. If you don't know how to use numbers to generate graphs (and you don't have time to learn and can't get help), you may be better off focusing your energy on helping your participants work directly with your stories.
- *Your participants may not be willing or able to use it*. Working with catalytic material in sensemaking takes longer, and it requires additional trust, since people won't have time to check your work.

But this is not a binary decision. It is a gradient. You can spend hours, days, or weeks doing catalysis, and you can use one, a few, or dozens of graphs in a sensemaking workshop. Find the amount of catalysis that works for you, your project, and your participants.

The principles of narrative catalysis

Separate statements

All statements in catalytic material are separated into what is *objective* (anyone would agree with it) and what is *subjective* (reasonable people might disagree about it).

Provide provoking perspectives

For each pattern we find in the data we collect, we write an *observation* (what anyone can see) and *at least two opposing interpretations* (things reasonable people might think the pattern means). This basic structure is the heart of catalysis.

Maintain mischief

The folk tale trope of the runaway food item, found across cultures, taunts us with the excitement of the chase.

> Run, run as fast as you can
> You can't catch me
> I'm the Gingerbread Man!

Like the Gingerbread Man's taunt, catalytic material is *a story you tell to your participants*. You tell it to communicate with them, to help them think, and to help them connect with your project, your stories, and each other. Preparing to tell the story requires attention to your story abstract (how you will introduce the material), your evaluation statements (how you will communicate its intent and support its use), and your coda (how you will prepare people to move beyond it).

Explore exhaustively

The best way to remove the possibility of cherry-picking is to examine the whole tree: every fruit, flower, leaf, twig, and root. This means:

- Consider the time and resources you will have for catalysis when you decide what questions you will ask.
- Analyze your data as completely as you can.
- When you find that you have to leave out some data or comparisons, explain the reasoning behind your choices.
- Share your data with your participants and allow them to explore it with you.

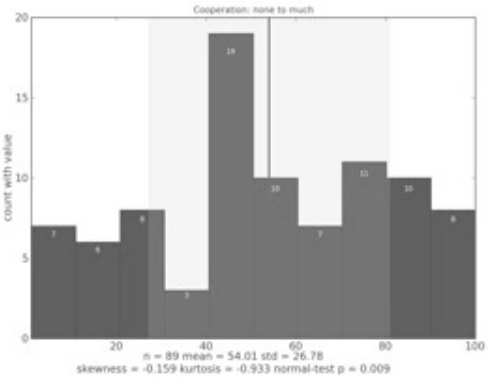
Prepare for participation

Getting catalytic material ready for sensemaking is more like building a game than it is like writing a report. A report is a rigid body with no moving parts. It must be accepted or challenged in its entirety. A game is mostly moving parts: instructions, options, suggestions, ideas. It invites people to use it to come to their own conclusions.

Catalysis in a nutshell

A simple example will illustrate what catalytic material looks like.

For this pattern (this graph), an observation might be that Column 5 has 28 more stories in it than Column 6. Two interpretations of the observation might be: “Our lazy support staff are slowing us down” and “Our hard-working support staff need more help.”



The catalysis process in brief

There are twelve phases in the catalysis process. We will go into them in more detail later on, but a quick overview will give you an idea of what is involved.

Generate patterns

In the first half of the catalysis process, you will enhance your data (when possible and useful) and use it to create patterns such as graphs, themes, and statistical results.

- Prepare your data. Make sure what you have is what people said.
- Verify data integrity. Make sure what you have is what people *meant*.
- Answer qualitative questions. Add to your patterns by interpreting the stories.

- Scope your exploration. Prioritize your catalysis effort given your needs, resources, and data.
- Generate results. Produce visualizations of patterns.

Use patterns to create catalytic material

In the second half of the catalysis process, you will work with the patterns you generated, choosing some of them to explore, explain, and interpret. Then you will use them to build catalytic material for sensemaking.

- Choose remarkable patterns. Select patterns that are strong, surprising, and relevant.
- Write observations. Clearly explain the patterns you found.
- Explore some patterns in depth. Read and theme story subsets to better understand remarkable patterns.
- Write interpretations. Think of 2+ opposing explanations of each observation.
- Write ideas and other extras. Add other things people can use in sensemaking.
- Cluster. Draw your material together into coherent groupings.
- Prepare catalytic material. Build game pieces for your participants to play with.

Bias-reducing rules

These rules can help you to minimize the bias you bring to the catalysis process.

- Be transparent. Explain what you have done and why you did it.
- Be accountable. When you add or choose things for your participants, *pretend they are watching you*. If they would not want you to do something, don't do it.
- Be optional. Explain to your participants that *they can disregard anything you have created* if they think it adds no value or detracts from their sensemaking.
- Be objective. Create and follow rules based on objective thresholds.
- Be emergent. Listen to the stories. Let them tell you what to do.
- Channel community voices. Pretend you are your participants. Do what they would do.
- Introduce diversity. If you can, get some help improving your interpretations.

The catalysis process in full

Step 1: Prepare your data

Preparing your data for catalysis means converting it from your collection format to your analysis format and testing it to make sure that what you are ready to analyze is what people actually said.

- If you entered your data (based on what people said to you in conversation), check that what you entered accurately represents what people said.
- If your participants entered their own data, check that people understood your explanations and entered their data correctly and meaningfully.

Step 2: Verify data integrity

Your data's integrity is how well it represents the intent of your participants. These are some of the most common problems you might encounter.

- If one answer in a list (or one point along a scale) was chosen much more often than others, it might mean people thought that was the safest answer, the answer you wanted them to choose, or a way to avoid answering the question.
- If your last few questions were rarely answered, or if the last few answers in a list were rarely chosen, it might mean your participants lost interest or ran out of patience.
- If two answer counts for a question are nearly identical, it could mean that people couldn't distinguish between two similar answers and picked one at random.
- If a lot of people ticked every single box, they might have thought all of the answers in your list seemed (perhaps insultingly) the same, or they may have wanted to say "yes yes *all of this*."

If you see any of these patterns, find some subsets of stories to compare. Then read the stories. Do the answers to the questions match the stories? If not, people might have felt intimidated, bored, confused, frustrated, or offended.

Step 3: Answer qualitative questions

Answering questions yourself about the stories you collected can help you create more useful catalytic material, as long as you remember two things:

1. Your answers must be as objective as possible. Anyone should be able to understand and agree with them.
2. You must explain to your participants that they are under no obligation to use your answers in their sensemaking. They can use them or put them aside as they like.

With that disclaimer in place, these are some questions about stories that I have often found useful.

- Questions about the storytelling event:
  - Was the story a recounting of events? Or was it a situation, scenario, fact, explanation, argument, or opinion?
  - Was the story represented as first-person, second-hand, or a rumor?
  - To what extent did the storyteller reframe the story as they told it?
  - If the storyteller expressed surprise, what was it about?
- Questions about events within the story:
  - When and where did the events of the story take place?
  - Did the storyteller imply that the story ended well or badly? For whom?
  - How many people were involved? One person? Two? A small or large group? The whole community or society?
  - Were any assets or resources mentioned in the story?

Questions based on themes

Story theming is a subset of annotation in which answers to the question "What is going on in this story?" emerge as you read the stories. This is an interpretive annotation, so put it forth tentatively.

1. Read each story and briefly describe its overall message in an abstract way. Some examples: *We never give up; I'm doing my best (but I'm the only one); We take care of each other*. Give each story 1-3 themes. Keep a running list of all the themes you've written, and whenever you can reuse a theme, do so.
2. Reduce your theme list to 6-12. Merge similar themes and remove themes associated with few stories. Also split up themes with too many stories.
3. Go back to each story and check that the themes associated with it capture the story's message. If you aren't sure, find an excerpt from the story that illustrates the theme. If you can't find one, drop the theme.
4. Create a "Themes" question and convert your themes to answers you can count.

Step 4: Scope your exploration

Every exploration of stories and data expands to exceed the time available. To lessen the effect of this inevitability, you will need to prioritize your catalysis effort. Start by figuring out how many patterns you can *generate*, how many you *need*, and how many you can *handle*.

The number of patterns	Depends on	Remember that
You can generate	How many questions you asked	You will be combining questions. Five questions will create 25+ patterns, and ten will create 100+.
You need	How strong your patterns are	To support sensemaking well, you need at least 20 patterns that are strong, surprising, and relevant. How many patterns you will need in order to *find* those 20 patterns could vary. It's better to have too many than too few.
You can handle	How strong your patterns are; how many stories you gathered; how much time and experience you have	Stronger patterns are easier to handle, and bigger numbers make stronger patterns. How much time you are willing and able to put into catalysis also makes a difference.

If you find yourself with more patterns than you can handle (which is typical), there are four ways to reduce the number without introducing bias.

1. Limit your depth. You can simply leave out entire categories of patterns, like those that come up when looking at trios of questions. You can always look at some of those patterns later, when you are exploring specific patterns.
2. Lump your answers. Every answer count creates another set of patterns. Looking for answers you can lump together—without distorting what people said—can help you reduce your workload while strengthening your patterns.
3. Set thresholds. You can focus only on specific types of stories, questions, or patterns, such as:
   - Only patterns that compare subsets of 30+ stories (trends will be weaker with smaller subsets)
   - The five questions with the greatest range of variation (because they are more likely to contribute to useful patterns)
   - The six questions a panel of participants chose as most relevant

   All of these choices exclude patterns, but they exclude them uniformly and without bias—or at least without *your* bias.
4. Get help. See if you can find some other people who can help you generate and consider more patterns. Many hands make light work!

Step 5: Produce graphical results

Because PNI projects ask simple questions, they generate simple patterns. Bar charts, contingency tables, histograms, and scatterplots are all you will typically need to support sensemaking. The Catalysis chapter of *Working with Stories* describes each of these graph types, and the same chapter of *Working with Stories in Depth* explains how to create them (in three different ways). You can also find abundant information on the internet on how to create and use each of these types of graph.

Step 6: Choose remarkable patterns

Remarkable patterns are:

- strong and clear
- surprising, not obvious
- relevant to the goals of the project

For example, here are some (fictional) remarkable and unremarkable patterns.

You see this pattern	You think	Is it remarkable?
Factory workers told more stories about assembly line incidents than managers, who told more stories about meetings.	Of course. That's to be expected.	No
Managers under 35 were more likely to say their advice had been ignored.	I wonder why?	Maybe
Workers in Division B told 72% more stories in which (they said) trust was low than workers in Division C.	Really? That's fascinating. I want to learn more.	Yes

What if you don't find *any* remarkable patterns? Does that ever happen? Yes. It can happen when participants are apathetic, intimidated, or mistrusting, and it can happen when you don't understand people well enough to build a project they can get excited about. When it happens, you have a few options.

- You can add more data by gathering more stories, asking more questions, and annotating your stories.
- You can help your participants work directly with the stories you collected, putting aside your plan of preparing catalytic material. You don't need catalysis to do PNI. Just bring the stories to the people.
- You can consider your current story collection a pilot and reboot your project with a new planning phase.

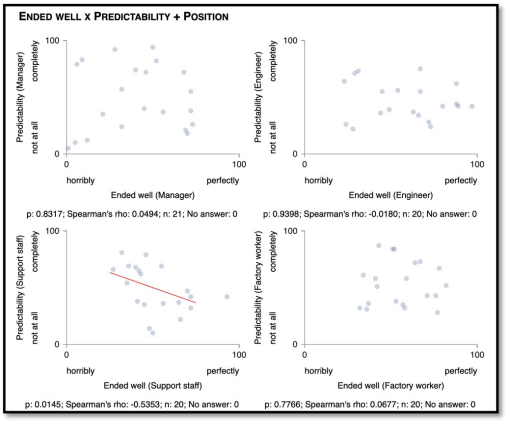
Step 7: Write observations

Now that you have selected some remarkable patterns, it is time to explain what you found. This is the easiest part of catalysis. Just state the obvious. Describe each pattern briefly and clearly. Include no statements that a reasonable person cannot see, understand, and agree with.

Also, give each observation a relative strength. This will help your participants (and you) to decide how much time and attention to give to it. Aim to write at least 20 observations, of which at least 10 are strong.

For example, these scatterplots show that "How well did this story end?" and "How predictable were the events in this story? were correlated (stories with more predictable events ended worse) for support staff, but not for managers, engineers, or factory workers.

I would give this pattern a medium strength. Its numbers are small, but the difference is strong, so it may be worth exploring.



Step 8: Explore some patterns in depth

Once you have written some basic observations, you can explore some of them more deeply. For each pattern you want to explore, choose some subsets of stories based on answers to questions that matter to the pattern. Then read the stories and look for similarities and differences.

To explore the pattern I mentioned above, for example, I might compare the stories told by support staff that ended well and unpredictably with those that ended poorly and predictably (at the two ends of the correlation line), then do a similar comparison with the stories told by another participant group.

Step 9: Write interpretations

Writing interpretations is the hardest part of catalysis. It requires a good imagination and the ability to step outside your own point of view. But with practice, anyone can learn to do it well. Here's how.

1. Read each observation. Then write down what you think it means. Not what it *is*: what it *means*—its causes and implications.
2. Disagree with what you wrote. Argue with yourself. Think of another way to look at it. Write down each alternative interpretation of the observation that comes to mind.
3. Find at least one verbatim quote from a story that supports each interpretation. If you can't find one, drop the interpretation and look for another one.
4. Randomize the order of your interpretations so your own opinion is impossible to find.

An interpretation example

Let's say you asked your participants how they felt about the stories they told, and their answers came out like this.

Happy	Hopeful	Relieved	Frustrated	Disappointed	Angry
130	127	62	121	97	61

You write the observation "Frustrated was chosen twice as often as Angry."

Next you think about what the observation might mean in the context of your project, topic, participants, and stories. You come up with two possibilities:

This could mean	This could also mean
A lot of systemic problems were described in the stories, so it makes sense that people were more likely to be frustrated in general than angry at anyone in particular.	Participants did not feel that they had been given permission to express anger, so they expressed diffuse feelings of frustration instead.

You illustrate each interpretation with an excerpt from a story, like these:

Systemic problems	Lack of permission
"I can tell you why it happened. We are all good people here. We are just saddled with these bureaucratic systems that were put in place in the stone age. They make us do things that make no sense."	"Can I guess why he did that? Yeah, I can, but … you know, I'm sure he means well. He just … it's hard to cope with all the … paperwork."

This is your catalytic material: remarkable patterns, descriptive observations, and multi-perspective interpretations. What are you going to do with it? Amass it, arrange it, and give it to your participants, who will use it as food for thought in their sensemaking process.

Interpretations and your background

If you have an analytical background, you might need to work extra hard to come up with opposing interpretations. Look to the stories for help. Ask yourself what the people who told the stories would say about the patterns you see. Remember, *you are not looking for factual evidence*. You are looking for perspectives people can talk about.

If you have a creative background, you might need to work extra hard to avoid writing interpretations that are interesting and clever but not actually useful. Use the stories to ground yourself in the reality of what has actually happened to these people and what matters to them.

The verbatim-quote rule can help with either (or both) of these issues. Quotes check for bias, test patterns for remarkableness, and give your participants the information they need to explore the pattern for themselves.

Facilitating group interpretation

Instead of writing interpretations yourself, you can help your participants write interpretations—if they are able and willing, that is. In my experience, few participants are interested in this level of participation. If they are, though, they might be able to build better support for sensemaking than you can. Make sure they are ready to:

- look carefully at each observation you have prepared (not just a few: all of them)
- come up with multiple relevant interpretations of each observation
- find story excerpts that support and illustrate each interpretation

Because this is a complicated and not-often-used option, I'm not going to devote more space to it here. The Catalysis chapter of *Working with Stories* explains how to facilitate group interpretation in detail.

Step 10: Write ideas and other extras

After you have finished writing your interpretations, you might want to add a few extras that will give your participants even more food for thought and discussion. Extras are especially useful in projects that surface few or weak patterns. To each interpretation you can add:

- Ideas: things the community or organization could do to resolve the problem or take advantage of the opportunity described in the interpretation.
- Questions: Invitations to discuss the interpretation together.

However, when there is a great distance between you and your participants, or when your participants are very sensitive or defensive about your topic, extras can be less than helpful. If you are in doubt, use verbatim quotes to test and support each idea and question.

Step 11: Cluster interpretations or observations

Clustering your observations or interpretations gives your participants a way to zoom in and out on your catalytic material. It makes the details of what you found available but not overwhelming.

Clustering interpretations is most useful when people are ready to challenge assumptions and think differently about your topic. Clustering observations is most useful when people are reluctant to explore multiple perspectives and would prefer a fact-based discussion.

In either case, the clustering process is simple. Move your observations or interpretations around in space, either on a computer screen or on a physical surface (as sticky notes or printed pieces of paper). Place like with like. Keep clustering until you have 5-10 groups. Give your clusters names that will have meaning and relevance to your participants. Use the cluster names to organize your catalytic material.

Step 12: Prepare catalytic material

Now that you have finished building your catalytic material, it's time to get it ready for your participants to use. Consider their needs and abilities as you do this.

- If your participants are apathetic, prepare clear and engaging infographics that highlight some relevant and memorable stories connected to each pattern and interpretation. Present your infographics in surprising ways, such as on posters people can visit or on game-like cards people can move around and stack up.
- If your participants are intimidated or defensive, give each person their own copy of your catalytic material—and some time to study it in private—before they are asked to discuss it with others.
- If your participants are illiterate, prepare and rehearse a series of spoken presentations in which you describe each pattern in your own words, then tell some relevant and memorable stories to illustrate each interpretation.

- If your participants don't understand graphs, simplify your graphs as much as you can, removing extraneous details. Also, prepare a simple explanation of each graph type, maybe on a handout they can refer to as they work.

Also, if you know that you will have less of your participants' time and attention than you would like to have, choose a selection of your materials to prepare for their use, and make the rest of your materials available but not required.

Watch your tone

However you present your catalytic material, your tone should be one of respectful support. Invite and inspire your participants to make sense of your topic together.

- Be professional. Nice-looking, well-prepared materials help participants feel welcome and honored. And don't draw attention to yourself. Play a supporting role.
- Be transparent. Explain your method and intent, especially its multi-perspective aspects. Provide participants with at least a brief summary of the material to take home.
- Be clear. Speak simply, avoid jargon, and check for understanding. Help your participants easily zoom in (to explore details) and out (to see the big picture).
- Be relevant. Keep your focus on the project's goals, and include plenty of verbatim quotes from stories, just as people said them.

Finally, test your material to see if it works the way you want it to. Put it in front of a few people without a word of explanation, and watch what they say and do. And don't stop testing your material after you start using it in sensemaking. Watch people use it, and keep working to refine it.

Chapter 8

Narrative Sensemaking

Sensemaking is what happens when people think and talk about situations and decisions in ways that are:

- Pertinent: focused on solutions and decisions that matter
- Practical: grounded in the concrete reality of lived experience
- Playful: experimental, improvisational, multi-perspective

For example, if you're having a town discussion about where to buy land for a new park, that's sensemaking. If you're talking about which types of pasta you like best, that's not sensemaking; it's just talking—unless you are planning a pasta festival.

Narrative	+	Sensemaking	=	Narrative sensemaking
Narrative goes beyond sensemaking. People also share stories to connect, persuade, inspire, and entertain.		Sensemaking goes beyond narrative. People also make sense of things by comparing options, presenting and refuting arguments, and brainstorming ideas.		Narrative sensemaking is what happens when people share stories in order to find solutions and make decisions.

A sensemaking workshop has four outcomes:

1. an *experience* people remember and tell other people about
2. a *record* of what happened, which becomes part of the story of the project
3. a set of collective *constructions*, such as themes, timelines, or larger stories
4. a set of collective *learnings*, such as discoveries, opportunities, or ideas

The experience of participating in a sensemaking workshop is its most important outcome. People always come out of sensemaking workshops with deeper and better understandings,

and they take those understandings with them wherever they go. The other three outcomes help everyone else learn from what happened in the workshop.

Four phases of narrative sensemaking

A successful narrative sensemaking workshop includes four distinct phases.

- **Contact**. People are introduced to the project, the stories, and each other. Contact usually takes the form of a brief orientation followed by a contact task in which people work with the stories in a simple way.
- **Churning**. The essential elements of sensemaking—people, project, and stories—shuffle and reshuffle in varied ways. Churning usually takes the form of an in-depth exercise that challenges people to delve deeper into the meaning behind the stories.
- **Convergence**. People, project, and stories come together into new understandings and negotiated commonalities. Convergence starts in the in-depth exercise and accelerates during a wrapping-up activity.
- **Change**. People, project, and stories emerge transformed. People see things differently than they did; more stories are told; and the project evolves. Change is usually explored during the workshop's after-party, in which participants reflect on their experience in the workshop.

I will have more to say about facilitating each of these phases later on, but first let's talk about preparing for sensemaking in general.

Getting ready for sensemaking

You learned a lot during the story collection phase of your project, and your understanding of the people who might want to participate in your sensemaking workshops (and why and how) has changed. That makes this a good time to pause, reflect, and review your plans.

Scoping your sensemaking

How many people will you need for sensemaking? A small or pilot project can get by with 5–6 participants. A medium-sized project will need 6–30. A project that is large, ambitious, complex, or contentious might need 30-100 participants.

How many people can you *expect* to participate in sensemaking? Expect roughly 25% of the number who were willing to attend a story-sharing session, 10% of the number who were willing to sit for an interview, or 5% of the number who were willing to fill in a form.

How many workshops you will need? Simple, small projects need only one. Large, ambitious, complex, or contentious projects might need 2-6.

Filling your sensemaking workshops

It is a common mistake to invite only the safest people to sensemaking workshops, those who are the most important, knowledgeable, or available. These are in fact good groups to invite, but if you invite *only* these people, you will miss out on the unique perspectives of everyone else.

You can avoid this mistake with a simple planning exercise. Make a list of all the participant groups you wish you could include in your sensemaking. Then think about how you could invite some people from each group and whether you need to change your plans to meet their needs.

When you can't invite the people who told the stories

If you know that the people who told your stories will not be able or willing to come to your sensemaking workshops, you can:

- Gather your stories in group sessions that incorporate a small amount of pattern discovery (such as placing stories on a landscape).
- Use a pairing task (page 109) to help your sensemaking participants find points of resonance between your collected stories and their own experiences.
- Gather contextual details (like voice recordings or photographs) that will give your storytellers a stronger presence in your sensemaking workshops.

Writing your workshop invitation

When you invite people to your sensemaking workshops, be clear about what will happen in them. People often think sensemaking workshops will be lectures, investigations, town halls, debates, or outlets for creative expression. A sensemaking workshop *can* incorporate aspects of these things, but it is primarily focused on the collective exploration of a topic.

Why does this matter? Because having few people show up to a sensemaking workshop is not the worst thing that can happen. The worst thing is having people show up, find out what you want them to do, realize it's not what they wanted to do, and sit through the rest of the workshop doing as little as they can.

Use your workshop invitation to help people make an informed choice about whether or not they want to get involved in sensemaking. That way everyone who shows up will show up ready to get to work.

Use plain language

Begin your invitation with a summary of what has happened in the project so far. Then explain what will happen in the workshop. You don't need a long explanation, but you do have to choose your words carefully. Say something like this:

> In our project on ___, we have gathered ___ stories about ___ from ___. We invite you to join us as we explore the stories and discover new ideas we can use to ___.

Note the lack of jargon. Don't say "narrative sensemaking." You and I can use that term between us, but you shouldn't burden your participants with it. Instead, explain what you are asking people to do in everyday terms that convey collaborative exploration, words like explore (not analyze) and contemplate (not identify).

Reconsider your win-win proposal

This is also a good time to take a new look at your win-win proposal, the one you put together the start of your project (page 31). See if it needs to change based on what you have learned in the project so far.

- How did people respond to your win-win proposal during your story collection? Is there anything you would like to say differently now?
- What do you know about your topic, your project, your participants, or your community or organization that you didn't know before?
- What can you tell people about your story collection that will help them understand why they might want to spend some time with it?

You might also want to evaluate how well your privacy policy has been working and decide if you want to change it as well.

Take another look at participant needs

Now think about the needs of your participants. You thought about this before, when you planned your project, but think about it again. What sort of invitation (and workshop) will your participants find interesting, respectful, and safe?

- Do you need to compensate them for their time?
- Do they trust you? If not, can you ask someone else to invite them?
- Will you need to remind them that they will be asked to listen as well as speak?
- Will you need to reassure them that they are qualified to participate?
- Do you need to separate some participant groups?

Sell your workshops to your participants

Explain the part the workshops will play in making your project a success. Ask people to step up and help your team, family, community, or organization find solutions that help everyone.

- Channel the excitement you feel about the project and its potential. Tap into the curiosity that led you to want to create the project in the first place. Give people a sense of the hope you feel for it. Show them that the project has strength and meaning, and show them that they can give it even more.
- Convey a sense of agency. Make it clear that the project is being done *by* the community, not *to* it. Be careful not to imply that your workshops will provide opportunities to promote agendas without listening to other points of view, but do imply that everyone who comes with an open mind will be heard and respected.
- Provide a sense of motion that shows people what has already been happening in the project. Some story excerpts can give people a preview of the experiences they will be exploring. Think of what a train conductor might say on a busy platform: "Train's moving, folks, get on board!"

Do more testing

Finally, test your workshop invitation with some potential sensemaking participants, either people who already told stories or people who have not yet participated in the project. How do they react? How can you improve what you have written?

Making time for sensemaking

Each activity in a sensemaking workshop must build upon the activity that preceded it. For this reason, sensemaking takes longer than story sharing and is harder to compress. Plan to allocate at least three hours to each sensemaking workshop.

Sensemaking also requires more mental energy than story sharing. Schedule your workshops when people are alert and ready to think clearly and deeply. Also, plan ways to renew flagging energy during the workshop. At least a few minutes of break time per hour are critical. If you plan to meet physically, some food and drinks can help as well.

Making space for sensemaking

People in sensemaking workshops need plenty of surfaces to build on.

- In a physical workshop, surfaces are usually walls or tables. Giant sticky notes (easel pads) make excellent sensemaking surfaces. You can stick them anywhere; people can write all over them; and you can take them home when the workshop is over.
- In an online workshop, surfaces are whiteboards and shared documents. Look for an application with multiple pages. Make sure participants can move between the pages as easily as if they were walking between the walls of a room.

And of course, any sensemaking workshop, physical or online, will need lots of sticky notes in multiple colors.

Preparing story cards

A story card is a manipulable representation of a story. Participants in your sensemaking workshops will use story cards to move, sort, count, compare, array, and cluster stories, physically or online. Prepare one "deck" of story cards for each small group of participants you expect to have in your sensemaking workshops.

If you have transcribed your stories (or people wrote them down), and your workshop participants will be able and willing to read them, you can prepare text-based story cards. They should be transparent (everything people said); attractive (nicely formatted); clear (no errors or confusing jargon); and easy to move, sort, rearrange, and compare.

If you can't use text-based story cards, you can play audio recordings or read stories aloud. As you do this, give each group a story card with a simple image (or a series of images) that represents the story. People can move, sort, count, compare, array, and cluster these cards as they talk about the stories they heard.

Planning and facilitating the contact phase

In the first sensemaking phase, people, project, and stories come together for the first time. Because every other phase of sensemaking builds on the first phase, your facilitation is more important in this phase than in any other.

Introducing your project

To bring your participants up to speed on your project, orient them in its past, present, and future. Also use your project introduction to anticipate and alleviate their concerns so they can get started working with your stories.

- **Goal**. Explain your project's motivating purpose.
- **History**. Tell the story of your project: how it started, what has happened in it so far, and what you plan (and hope) will happen in the rest of the project. Also describe the stories you collected. Explain how, when, and from whom you collected them.
- **Process**. Briefly outline the schedule and activities of the workshop, and explain how it fits into the larger project.
- **Privacy**. Describe how the workshop will be recorded and processed. Explain how anonymity will be guaranteed. Explain how people can see and change what they said after the workshop is over.

Introducing people to your stories

The way you represent the stories you collected to your workshop participants will affect how they work with them.

- Represent the stories you collected as relevant to the project, connected to the community or organization, and worthy of respect and attention—but no more or less so than the stories participants might tell during the workshop.
- Represent the stories you collected, and the stories people will tell in the workshop, as accounts of lived experiences to be heard and considered, not data to be analyzed, and not works of art to be criticized or improved upon.

So what should you say about the stories you collected? Something like this.

> In our project so far, we gathered ___ stories about ___ from ___. We will be drawing from the stories and from our own experiences today as we think together about ___.

An example introduction

Putting these parts of your introduction together, you might say something like this.

> Hello everyone. Thank you for being here.
>
> As you know, at the town council we have been working on a project to help our community provide better support to disabled people. Over the past six months, we have gathered 108 stories about disability and accommodation from people all around our community.
>
> We are here today to work with those stories, and to share some stories of our own, as we work together to discover new insights and ideas. The things we say and build today will form a prominent part of our final project report, which the town council will rely on as they revise the rules for new construction in our community. It will also be available to everyone in the community.
>
> Thinking and talking about stories is an *ancient* and *natural* way of making sense of things. Don't worry about doing it right. Everyone is qualified to do it.
>
> As we work together today, I would like to ask you to remember two things:
>
> 1. Please give all of the stories you hear and read today as much respect as you would like everyone else to give to your own stories.
> 2. Our goal today is not to debate or prove anything. We don't have to reach agreement. We are here to listen, to be heard, to learn, and to help our community.
>
> Now here's the plan. I've written it here so you can check on it as we go.
>
> 1. We will start by breaking into small groups.
> 2. Then I'll give you the stories and ask you to do a simple task with them.
> 3. After that we'll take a short break.
> 4. Next we'll move into a more focused exercise that will help us explore the stories and our topic in more depth.
> 5. Then we'll have lunch.
> 6. After lunch we will discuss some of the things that surfaced in the exercise.
> 7. Finally, we'll close the workshop by talking about what happened in it and how it has changed our perspectives and our project.
>
> Your name will not be connected with anything you say here today. You will be referred to only by a participant number, which I will give you in your small groups. In two weeks we will send you the workshop record, and you will be able to review and correct (or retract) anything you said.

I timed myself saying this example introduction, just as I wrote it here. It took about two minutes to say. That's how long your introduction should be. Don't waste your participants' time by delivering a lecture on what makes a story a story. The stories will tell them that.

Don't ask for feedback or answer questions during your introduction. If people have questions, ask them to talk to you privately during the first period of small-group work. Don't derail the energy of the workshop. Get everyone started working with the stories as soon as you can.

Setting up small groups

If you plan to incorporate some story sharing into your sensemaking, split up into groups of 3-5 people, as you would in a story-sharing session. If you don't plan to ask people to share stories, you can split up into groups with 2-6 people.

You also need to think about the range of perspectives you are likely to find within each small group.

- If they will be *very* different, plan to *start* your workshops with single-perspective groups. Everyone should have first contact with the stories in an atmosphere of safety and freedom. Later you can ask people to work together across perspectives. For example, a report-back ritual at the end of each exercise (in which each small group tells what happened) can help people listen across differences.
- If their perspectives will be only *mildly* different, you might want to challenge your participants to build multi-perspective groups. Just be transparent about what you are doing and why, and ask people to listen with respect.
- If you don't know how different your participants' perspectives will be, find out.

Choosing a contact task

Giving people an active task to perform while they are experiencing your stories for the first time helps them develop a better understanding than asking them to just sit and passively read the stories. Use a simple set of instructions like these.

- **Sorting**. Sort the stories into groups based on something you see in them or think about them. Count and compare the groups.
- **Arranging**. Place the stories in a line based on something you see in them or think about them. Which are most to least hopeful, impactful, risky? Talk about what you see.
- **Clustering**. Move stories that seem related or connected close to each other. Talk about the theme or message of each cluster of stories. What do they have in common? What do they say to you?
- **Pairing**. Choose a story that resonates with you. Retell it in your own words. Share a story of your own that connects to it in some way. What do the two stories say to you?

Each of these contact tasks is fully described in Chapter 12 (Group Exercises for Narrative Sensemaking). After the task, ask each small group to tell everyone what they noticed and learned, and lead a short general discussion about the stories.

Helping people save face in the contact task

"Saving face" means doing things to avoid embarrassment. If you think the stories you collected will challenge your participants' sense of self-respect or self-worth, design the contact phase of your sensemaking workshop to help them save face.

- Don't ask people to evaluate or criticize stories. Instead, ask them to notice connections among stories and between stories and their own experiences.
- Don't put people under a spotlight. Instead, give them some quiet, private time to encounter the stories. As you introduce the contact task, make it clear that each small group can read the stories together or separately, as they like.
- Give everyone a short break during or after the contact task to restore their energy.

Sampling your story collection

Estimate how many stories each small group will be able to read or listen to in the time you have set aside for your contact task. If that number is smaller than the number of stories you collected, you will need to ask people to choose a sample of your stories to work with.

1. Before the workshop, give each story a reference number, either a random number or the order of collection (if it has no other meaning).
2. In the workshop, after your introduction, give each small group a copy of the entire story collection.
3. Suggest (but do not require) that each group start skimming the stories at a different starting point: group A at story 1, group B at story 50, and so on. Explain that spreading out across the collection in this way will build a better sample for sensemaking.
4. Suggest (but do not require) a guideline for choosing stories to use in sensemaking. For example, you could ask people to choose stories that resonate with their own experiences, surprise them, or expand their thinking.
5. After each group has chosen a sample of stories, introduce your contact task. You can ask each small group to focus only on the stories they selected, or you can merge the stories collected by all of the groups and ask everyone to work with all of them.

Planning and facilitating the churning phase

In the churning phase of sensemaking, what happened during contact keeps happening—in complex, varied, and surprising ways. People, project, and stories circle each other in a dance of juxtaposition and connection.

Churning helps the rocket ship of sensemaking achieve escape velocity and rise above the atmosphere of assumptions, misunderstandings, and entrenched thinking that holds people back from new understandings. It's the view from space—that sight of the big blue marble—that is the ultimate goal of sensemaking.

Choosing an exercise

To begin the churning phase of your workshop, choose an in-depth sensemaking exercise—one of the exercises described in Chapter 9, or another exercise similar to those described

there. If you have plenty of time (and motivated participants), you can also chain two exercises together or embed one within another.

Using catalytic material

Introducing catalytic material in sensemaking is like introducing the elements of a board game: the board itself, and the cards, tokens, dice, and other manipulable items people will use to play the game. The way you present this material can inspire people to explore it with enthusiasm or intimidate people into turning away from it in despair. These are some things you can do to make the first outcome more likely.

- **Start with the stories**. Don't show people your catalytic material before they have encountered your stories. If you do, they may not understand that the patterns they are looking at came from real stories told by real people.
- **Return to the stories**. Don't ask people to use catalytic material on its own, divorced from any stories. If you do, people will forget to use the stories to make sense of the patterns. To make it easy to move back and forth between stories and patterns, include answers to questions on your story cards, and work to minimize the time it takes to find stories with particular answers.
- **Provide meaningful choices**. In the Catalysis chapter I said you need at least 20 remarkable patterns to support sensemaking (see page 84). This is why. Giving people an array of patterns to choose from gives them the opportunity to pursue their own interests and take ownership of their explorations.
- **Provide active tasks**. Don't ask people to just sit and read your catalysis material, and don't make them guess what you want them to do with it. Give them an interesting task with a clear purpose.

Chapter 12 provides detailed instructions for three ways to use catalytic material in sensemaking workshops. Whichever of the three methods you use, place it after your story contact task, after (or instead of) any non-pattern-focused story exercises (ones that use all of your stories, or a sample of them), and before your wrapping-up activity.

Guiding group interactions

Games need rules as well as materials. The rules of the game people will play with your catalytic material will be defined by the instructions you give them. Some tips:

- **Provide group time and alone time**. People need groups to bounce ideas off each other, but they also need alone time to save face as they make sense of the stories and catalytic material. Plan these times into your workshop agenda. If you think people will be wary or intimidated, plan extra alone time. If you think people will be bored or distracted, plan less alone time.
- **Suggest complementary roles**. Encourage group members to take on roles that suit their unique interests and abilities. For example, one person might pore over graphs, another might pull out story subsets, and a third might read stories. Don't force people into specific roles; that tends to backfire. But do mention that complementary roles can help groups accomplish tasks, then let each group work out the details themselves.

- **Provide an audience**. Plan to have each group report on what they find to the whole workshop. This motivates groups to find insights and to draw their insights together into a coherent presentation. You can also give groups the opportunity to record their presentations (in written, audio, or video format) to be communicated to people outside the workshop.

Planning for movement

As you plan your sensemaking workshops, remember that they must have a faster pace than story-sharing sessions.

- Churning requires that people approach your topic multiple times from multiple angles. So you'll need to pack more activities into a sensemaking workshop than you would into a story-sharing session.
- Sensemaking is more difficult and less engaging than story sharing. A long, unbroken span of time is more likely to cause people to lose interest during sensemaking than it will during story sharing.

Within the exercise(s) you choose, limit each *activity* (placing stories, sorting stories, etc) to 30 minutes or less. Don't worry that people will not be able to finish the activity in time. Finishing activities is not the point of sensemaking. Doing *lots* of activities one after another—activities that provide multiple perspectives on your stories and your topic—is the point.

Here are some ways you can keep up a good pace.

- Build crumple zones into your plan: activities that can be compressed if you get behind schedule.
- Use your workshop introduction to set up an expectation of movement. Explain that things may move faster than people expect or prefer, but that they'll understand the need for speed by the end of the workshop.
- Get ready to display your time schedule throughout the workshop so groups can manage their own time.
- Plan some simple and respectful reminding rituals (like 5-minute and 2-minute warnings) to keep people on schedule.
- If you have enough time and participation, consider shaking things up by reshuffling your small groups between your contact task and exercise.

Observing and intervening

As the workshop goes on, watch to see if churning is happening. If it is, you'll see:

- during small group work: exploration, realization, discovery
- during times of transition: a buzz of curiosity about what will happen next
- during report-back periods: plenty to say about what happened
- during breaks: pride in accomplishment

If you don't see churning, it might be because:

- Your story collection is weak. Give it a boost by inserting a pairing task into your sense-making exercise.
- Your instructions were confusing. Give everyone a break, then explain the exercise again.
- This exercise isn't working for these participants and topic. Change it! Think of parts of the exercise you can shorten, lengthen, remove, or add to make it work. Or offer people another exercise that is simpler, safer, or more interesting.
- People are reluctant to engage with the stories, the topic, or each other due to disinterest, distrust, or conflict. Talk to them. Ask them for their help; listen to their concerns; help them get what they need.

Planning and facilitating the convergence phase

Convergence in sensemaking is the pulling together that takes place after people, project, and stories have been mixed and remixed many times. Rivulets become streams and streams become rivers.

To help your sensemaking workshop move into a convergent phase, begin by setting up conditions for convergence by emphasizing collaboration, emergence, and independence.

- When you tell people what they will do in the workshop, tell them that they will build a coherent but internally complex composite that includes all perspectives. Do not imply that they will come to a single unified conclusion that resolves all differences.
- Talk to your participants about discovering emergent patterns in the stories you collected and in their subjective responses to them. Do not imply that they will amassing evidence or advancing arguments through objective analyses.
- In this part of the workshop, begin to fade into the background. Continue to provide guidance, but do it in a looser way than you did before. Give your participants more latitude to take the workshop into their own hands.

Wrapping up the workshop

One way to wrap up a sensemaking workshop is with a list-making activity. Building a wrapping-up list helps participants *tell the story of the workshop* to those who did not attend it and gives them a chance to express their wishes and concerns in their recounting of the workshop. The following table shows some ideas for lists you can help people build.

Items	Prompt
Discoveries	We were surprised to find out ___.
Learnings	Hearing about ___ helped us to understand ___.
Perspectives	When we saw how ___ experienced/saw ___, we felt/thought ___.
Differences	When we saw how ___ and ___ experienced/saw ___ differently, we felt/thought ___.
Connections	When we saw that ___ and ___ shared ___, we felt/thought ___.
Curiosities	Seeing ___ made us wonder ___.
Dilemmas	When we saw ___, we wondered whether ___ or ___.
Concerns	When we saw ___, we became concerned about ___.
Ideas	Seeing ___ gave us an idea: ___.
Opportunities	Hearing about ___ made us realize that ___ could ___.
Suggestions	Seeing ___ led us to suggest that ___.

You can ask people to think of list items individually (and anonymously) during a time of private reflection, during small-group discussions (followed by a report-back period), or during a whole-workshop discussion.

Choosing and discussing convergent stories

Another way to wrap up sensemaking is to ask people to *choose some stories to highlight* in the workshop record. Three types of *convergent stories* are likely to rise to the surface of a sensemaking workshop.

- **Pivot stories** keep appearing again and again because they are found at intersections of meaning in the workshop, the project, and the community or organization.
- **Voice stories** cry out to be passed on. They bring little-heard perspectives into wider awareness, breaking down barriers in the form of assumptions, fears, and stereotypes.
- **Discovery stories** are "aha" stories. They help people discover remarkably surprising insights about the experiences of others that they had not seen or understood before.

Don't ask for pivot stories, voice stories, and discovery stories by name. Instead, use indirect questions like these:

- Were there any stories that *kept coming up* for you today? Did you ever say to each other, "Hey, there's that story again"? Which stories were like that for you?
- Which stories *cried out to be heard* today? Which stories did you find yourself wanting to tell to everyone in the workshop, or outside it?
- Which stories *surprised* you the most today? Which stories *taught* you something? Which stories do you want to *remember* the most?

You can ask these questions in a whole-workshop discussion, or you can ask each small group to choose some stories, then retell the stories to the whole workshop. In either case, ask people to also explain *why* they chose each story and what it means to them.

Don't mention convergent stories until you get to the wrapping-up part of your workshop. They can only be found in retrospect, after participants have been working with the story collection for some time.

Choosing and discussing convergent patterns

If your project is complex and ambitious, your participants are motivated, and you are using catalytic material in your exercise, you can ask your participants to list convergent patterns as well as convergent stories. You can ask people to choose convergent patterns using the same questions you would use to help them choose convergent stories; just say "pattern" instead of "story."

Watching for convergence

What does convergence look like? As above, it looks like collaboration, emergence, and independence. Participants should work together to make the workshop their own.

	As you watch groups work, ask…	And if not…
Collaboration	Are group members working as a team? Is everyone engaged and included? Or have some people checked out?	Remind non-collaborating groups that their task is a collective one, and that their goal is to produce a single (but not simple) composite result.
Emergence	Do you see small things joining up to form larger things, like themes or patterns?	Nudge groups in the direction of emergence by asking them to prepare to tell everyone about the larger patterns they have found.
Independence	Is the group charting its own path? Or is it doing only what is required?	Drop a hint to directionless groups that a certain degree of collaborative creative license is both acceptable and encouraged.

Planning and facilitating the change phase

Sensemaking workshops don't always create immediately obvious change. The impact of participation might surface days or weeks later, as people reflect on their experiences. But change is the goal.

Even though change tends to happen at the end of a sensemaking workshop, you can't start facilitating change at the end. You have to facilitate it throughout the workshop.

Set an expectation of change throughout the workshop. As you speak to participants, communicate a sense of curiosity about what will emerge as the group works together and how the workshop will change the project and the community.

At the same time, don't oversell consensus. Few sensemaking workshops end in perfect agreement. That's fine, because agreement is not the point of sensemaking. It's not the point of stories, either. People have always used nested stories to represent and explore internally complex situations from many perspectives.

So if the story that emerges from your workshop includes conflicting views, you've done it right. Communicate this expectation to your participants.

Facilitating the after-party

Sometimes the best part of a sensemaking workshop happens after it ends. When people have time to sit around and chat about the experience they've just had, they often say things they weren't ready to say before. So if you're recording the workshop, keep recording, and if you're taking notes, keep writing.

This is a good time to:

- Ask if there is anything else anyone would like to say, perhaps something they didn't feel comfortable saying in the workshop itself. Is there a final message anyone would like to convey to you, the group, the community, or those in charge? Is there a story anyone would like to tell but didn't get a chance to tell?
- Invite reflections on the workshop. Ask meta-level questions about it. What was it like? What was familiar or strange? What did people learn from it? How did it feel? Was it inspiring, annoying, uncomfortable, hopeful?
- Ask for advice and help finishing the project. What do people think should happen next? Would anyone like to stay involved in the project?
- Gather feedback on your methods. Ask participants to evaluate PNI and your facilitation. Do they think the workshop was worth their time? Which parts of the workshop did people like most or least? Why? How would they change it if they could?

Watching for change

There are two aspects of change in sensemaking: how people *feel* and *think* about your project, topic, and participants. Between the start and end of a sensemaking workshop, you should see changes in both of these areas.

A change in feeling. When a sensemaking workshop ends well, its participants experience a sense of satisfaction and a release of tension. Their speech and body language become more open and expressive, and they discover a new sense of curiosity about the project and its topic.

A change in thinking. When a sensemaking workshop ends well, its participants experience a new transcendence of thought. The things they say about the topic change in a way that indicates a broadening of the perspectives they brought to the workshop. For example:

If they say at the start	They might say at the end
How on earth could ___ think ___? I will never understand ___.	I am beginning to see how ___ might think ___. I don't ___, not at all, but I can see why ___.
There is no way ___ can/will/should ___. The situation is ___, and there is no point talking about it.	I was surprised to learn ___, I'm curious to learn more about ___, and I'd like to try ___.
I don't see why we should waste our time talking about ___. I/we already understand it.	There is a lot more to ___ than I thought. I would like to learn more about ___.
You'll never convince me that ___, so why are we talking?	I have learned so much about ___. I was particularly surprised to learn that ___.

Watch people during your after-party. If you can see release, satisfaction, and transcendence, you will know that change has happened. If not, reflect on what happened so you can support sensemaking even better in your next workshop.

Your workshop record

There are several reasons you might want to make a record of a sensemaking workshop: to capture a once-in-a-lifetime event; to give your participants a voice; to help your project achieve its goals; to make the case for more use of PNI in the future; to improve your PNI practice; and to help other people learn how to use PNI.

There are also several reasons you might *not* want to make a workshop record: because your participants don't want to be recorded; because your participants don't trust you; because your topic is sensitive or private; because you have no budget for recording equipment; because you don't have time to process recordings; or because you just don't feel you need to record the workshop.

If making a record of the workshop will improve its utility to the project, make a record of it. If *not* making a record of the workshop will improve its utility more—which *is* sometimes the case—consider that option instead.

What to include in your workshop record

Now I'll go over the things you might want to include in your workshop record.

Summaries. These are a few brief sentences that sum up the major events of the workshop: what people explored, what they found out, how things played out. The best summaries come from the workshop participants themselves.

Lists and/or stories. You can record the lists people built (and/or the stories they selected) in your wrapping-up activity. You can record only the lists and/or stories, but you can also

ask people to annotate each item or story with additional information (like why they chose it and why it matters to them).

Constructions. People build amazing things in sensemaking workshops: timelines, landscapes, story elements, composite stories, and so on. Sometimes these things convey meaning so well that they reach far out past the workshop and become touchstones people talk about for years afterward. However, be careful not to place too much emphasis on constructions as workshop outcomes. They are like the sketchbooks travelers fill up on their journeys. They help travelers think about each place they visited and describe the journey to the people back home. But nobody goes on a journey just to fill a sketchbook.

Audio or video recordings. For most projects a whole-workshop recording is unnecessary and intrusive. It's better to record specific portions of the workshop. The most useful portions to record are:

- Any new stories told by participants during tasks or exercises
- Report-back times and wrap-up discussions within tasks or exercises
- The wrapping-up activity
- The after-party

Your post-workshop review

As you plan your sensemaking workshop, save some time for a post-workshop review, just for yourself and any helpers you had in the workshop. Fifteen minutes per two hours of workshop time is a good ratio. Think about:

- **What happened.** Describe what happened in the contact, churning, convergence, and change phases of the workshop. What went as you expected? What didn't? What changes did you see between the start and end of the workshop?
- **Interactions.** How did these people interact with each other? How did their interactions change as the workshop went on? Were any moments of interaction particularly important?
- **Stories.** Consider the stories people told, retold, chose, moved around, and built. How did the stories change as the workshop went on? Were any of the stories particularly important to the workshop participants? How so?
- **Context.** What was special about these people in this workshop at this time? How do you think the context of the workshop influenced what happened in it?
- **Impact.** How did the workshop change the overall project? Is there anything you want (or need) to do about that change?
- **Your facilitation.** How can you improve your facilitation based on this experience? What was your plan? In what ways did you stick to it, and in what ways did you depart from it? If you could go back and facilitate the same workshop again, what would you do the same, and what would you do differently?
- **Your PNI practice**. What did you learn from this workshop that you want to incorporate into (or take out of) your PNI practice?

Finding Your Own Sensemaking Style

If you can't make sensemaking work for *you*, you can't make it work. Build on your strengths and work on your weaknesses.

Strength	If you have it	If you don't
Contagious enthusiasm	Draw on your energy to get other people excited about the opportunities provided by a sensemaking workshop.	Collaborate with some energetic people, or prepare some things to say that convey the potential of the workshop for you.
A talent for teaching	You might be able to use more complex elaborations of sensemaking exercises than some others can.	Give yourself more time to gain experience before you try some of the more complicated sensemaking possibilities.
Tolerance for discomfort	Set aside an extra five minutes after each task or exercise to ask your participants how the workshop is going for them. Find out how comfortable they feel, and be prepared to adjust your instructions to help them find the right level of discomfort to keep things moving.	Write and practice scripts for the things you will need to say at the start and end of each workshop activity. Or find a collaborator who is comfortable with discomfort and ask them to give the instructions when you can't.
Tolerance for ambiguity	Prepare yourself to help (not judge) participants who have a hard time with ambiguity with patience and compassion.	If you can't help but create lists and other fixed structures, present them as optional resources, not as commands.
Multi-perspective thinking	Work on ways to incorporate your skill into your facilitation of sensemaking. Use what you do naturally to help other people see what you can see.	Work on your own skills for contemplating multiple perspectives. Read about the area of psychology called "perspective taking." Try some sensemaking exercises on your own.

Chapter 9

Group Exercises for Narrative Sensemaking

This chapter tells you how to facilitate four story-contact tasks and seven narrative sensemaking exercises.

Contact tasks

Contact tasks introduce people to stories. In most sensemaking workshops they are followed by more in-depth exercises. However, they can also be useful on their own when your participants are unmotivated or your time or experience is limited.

All four of the contact tasks described here require at least 30 minutes to complete. The first three require at least two people, and the last (pairing) requires at least three.

Starting your contact task

All four contact tasks start out in the same way, so I will describe their "Starting out" sections only once.

Minutes	Who	What to do
2	You	Explain briefly what people are about to do.
2-5	You	If you have more than five people, set up groups of 2-4 people (3-4 for pairing).
1	You	Give each group a deck of story cards. Also give each group its own wall, table, giant piece of paper, or online whiteboard.

Sorting stories

This is the simplest of the contact tasks. It is similar to the "card sorting" method used in other participatory approaches.

Minutes	Who	What to do
10+	Small groups	Read the stories, separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Talk about the variation you see in the stories. Think of a set of categories you could use to sort them. Choose categories that mean something to you. • Maybe some of the stories are forward-looking, some consider the present, and some look back into the past. • Maybe you want to identify some themes in the stories, like challenge or hope or planning or crisis. • Maybe you notice in the stories a variety of different issues, concerns, actions, interactions, or ideas. Think of some way to separate the stories into interesting groups. Then sort the stories, count the groups, and talk about what you see.

Arranging stories

This task is a bit more nuanced (and a bit harder to understand) than sorting.

Minutes	Who	What to do
10+	Small groups	Read the stories, separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Talk about the variation you see in the stories. Think of a way to rank the stories that seems like it might be interesting. • Maybe some stories seem more hopeful than others. • Maybe some stories tell about situations with more conflict, cooperation, or innovation in them. • Maybe some stories seem to have been told with more confidence or self-assurance than others. Line up the stories in relation to each other. You can do this with the story cards you were given, or you can copy their names onto sticky notes and line them up on a wall or table (or in an online space).

Clustering stories

This task is like the clustering exercises used in a variety of participatory methods.

Minutes	Who	What to do
10+	Small groups	Read the stories, separately or together, silently or aloud. Absorb the stories as a group.
10+	Small groups	Lay all of the stories out in front of you, or copy their names onto sticky notes and stick them to a table or wall. Then move similar stories close to each other. Don't worry about *why* the stories are similar; just keep moving them until it feels like you have represented their similarities by how close they are together. Then stand back and look at the clusters of stories you have created. What do they mean? Can you give the clusters names?

Pairing stories

This task is especially useful when your sensemaking participants are not the people who told the stories you collected. Because people will be sharing stories, this task requires at least three people per group. You may want to record the new stories people tell and use them in the rest of your workshop or project.

Minutes	Who	What to do
1	You	If the stories are being recorded, start a separate recording device for each small group.
5	Each person separately	Read the stories silently, passing them around so each person gets to read each story. As you read, choose a story that resonates with you. Then think of an experience you have had that the story reminds you of.
20+	Small groups	Each person, read or retell the story you chose, then tell the story it reminded you of. If you are being recorded, give each new story a name and say it on the recording. If you don't want to tell a story of your own, you don't have to. Just read or retell the story you chose.
5-10	Each person separately	If the stories are being recorded (and you want to), answer questions about each new story you told and about yourself.

Finishing your contact task

All four contact tasks end in the same way, so I will describe their "Finishing up" sections only once.

Minutes	Who	What to do
5+	Everyone together	Each group, explain what happened in your group and what it meant to you.

Sensemaking exercises

These in-depth exercises should always take place after a contact task. However, if you only have enough time for one activity, you can use one of the more complex contact tasks (or one of the simpler exercises) by itself.

Twice-told stories

This exercise is almost simple enough to be a contact task and just barely complex enough to be an exercise.

Requirements

At least four people; at least 45 minutes.

Preparation

In this exercise, each group will choose a story to retell to the whole workshop. Before your workshop, prepare a question you will ask people to answer:

> Which of these stories would _____?

Fill in the blank space with something that relates to your project's goals, not to the quality of stories. For example, you might ask "Which of these stories would open our eyes to the way this issue appears to others in our community?" rather than "Which of these stories would make a great movie?" Also make sure that it will be possible to answer the question by choosing stories from your collection.

Starting out

Minutes	Who	What to do
2	You	Briefly introduce the project, the topic, the stories, and the exercise.
2	You	Set up at least 2 groups of 2-4 people.
1	You	Give each group a deck of story cards.
1	You	Give everyone the story-selection question(s) you prepared.

The main part of the exercise

Minutes	Who	What to do
20+	Small groups	Read or listen to the stories, separately or together, silently or aloud. Working together, use the question you were given by the facilitator to *choose a story to retell* to the whole workshop. If you can't agree on one story, you can choose two.

Finishing up

Minutes	Who	What to do
15+	Everyone together	Someone from each group: read or retell the story you chose. Explain why you chose it and what it means to you.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

Instead of offering one question, you can offer participants a choice of 3-5 questions they can use, or you can help each group develop a question of their own (but make sure the questions relate to utility, not quality).

Timelines

This exercise works well when there is at least one relevant time sequence present in (and important to) your stories.

Requirements

At least two people; at least 90 minutes.

Preparation

Read through your stories and choose start and end dates for a timeframe on which the stories can be placed. This could be the history of a place or group important to the stories, or it could be stages in a process the stories recount.

Make sure the timeframe you choose fits the stories you collected. You can give people a few timeframes to choose from—if you can find them in the stories. But don't let people come up with their own start and end dates. The stories might not fit them. And if the stories don't take place across a coherent timeframe, don't use this exercise.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than five people, split up into groups of 2-5 people.
1	You	Give each group a deck of story cards. Also give each group its own wall, table, giant piece of paper, or online whiteboard.
1	You	Give or show everyone your timeframe start and end labels.

The main part of the exercise

Minutes	Who	What to do
5	Small groups	Draw a horizontal line across your space. Then look at the time-frame labels you were given by the facilitator. Place the labels at the start and end of your horizontal line.
45+	Small groups	Read the stories, separately or together, silently or aloud. When you find a story that seems to fit on your timeline, write its name on a sticky note and place the note on the timeline where it seems to fit. You don't have to place all of the stories on your timeline. Just place the ones that seem to fit on it. If you can't guess when a story happened, put it aside.
20+	Small groups	Look at the patterns in your timeline. How do the stories change as you move along it? Do you see any themes or trends? Annotate your space to capture your thoughts.

Finishing up

Minutes	Who	What to do
10+	Everyone together	If you have more than one group, have someone from each group describe the timeline they built. Then talk about the patterns you see across all of the timelines.
5+	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

You can supplement this exercise with a variety of elaborations. For example, you can:

- Ask each group to build a timeline on a subtopic of their own (within your overall topic).

- Encourage groups to respond to the respond to the stories they are placing with stories of their own (and place those as well).
- Ask groups to mark turning points along their timelines, perhaps even setting up a game-like rule such as "Your timeline must include three surprises."
- Ask groups to move the stories they place up (like a floating balloon) and down (like a falling stone) on a second dimension such as "from conflict to cooperation."
- Ask groups to annotate their timelines with distinct phases (such as "before/after the fire") separated by boundaries.
- Ask groups to compare their timelines to published models that specify stages or steps in some process.
- Ask groups to add fictional branches to their timelines toward better and worse future or present states.

Landscapes

Timelines and landscapes are complementary because time and space are complementary. Both are essential elements of our lives. We move in time as we move in space, so these two ways of arranging things come about naturally. The story-time connection is the more obvious one, so the timeline exercise is easier for inexperienced participants and facilitators to work with. Mapping stories onto conceptual space is a more abstract activity.

Requirements

At least two people; at least 90 minutes.

Preparation

When this exercise is used for sensemaking, it's not about jogging memories; it's about noticing patterns. So while the *process* of preparing dimensions to use in this exercise is similar for sensemaking and collection, for sensemaking *the dimensions must exist in the stories*. Read through them looking for dimensions (things that vary) and that have relevance and meaning to your project.

As you would for story collection, remember that:

- Each dimension must go from something to something, like "Trust: from absent to complete" or "Predictability: from clockwork to chaos."
- Dimensions in pairs must be independent of each other. Knowing a story's value on one dimension must not provide a hint as to its position on the other dimension.
- The more dimensional pairs you can find, the better. Even if you only end up using one pair, take some time to explore a variety of possibilities.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than five people, split up into groups of 2-5 people.
1	You	Give each group a deck of story cards. Also give each group its own wall, table, giant piece of paper, or online whiteboard.
1	You	Give or show everyone your dimension labels (or choices of labels).

The main part of the exercise

Minutes	Who	What to do
5+	Small groups	Look at the pair of dimensions given to you by the facilitator (or choose a pair of dimensions to work with). Write the dimension names on sticky notes. Also write labels for each corner of the space (e.g., “High trust, low predictability”). If you are meeting in physical space, use your sticky notes to mark out a space about one meter square. Online, use an entire whiteboard page.
45+	Small groups	Read the stories, separately or together, silently or aloud. As you read each story, write its name on a sticky note, then place the note into the space where it seems to belong. If you can’t decide (or agree on) where a story belongs, write its name down twice and put it in two places, writing on each note why you are putting it there. Keep doing this until you have gone through all of the stories.
20+	Small groups	Stand back and look at the patterns you have created. Do you see clusters of stories? Do they have common themes? Are there gaps where there are no stories? What does that mean? Are there boundaries between different groups of stories? Annotate your space to record what you see.

Finishing up

Minutes	Who	What to do
10+	Everyone together	If you have more than one group, have someone from each group describe their landscape. Then talk about the patterns you see across all of the landscapes.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

Watch people as they start placing sticky notes into their spaces. If they seem to be *categorizing* the stories, mention that *each dimension is a spectrum* and that any story can be placed anywhere in the space. You are not asking people to measure or evaluate the stories; you are asking them to think about what the stories mean.

These are some extras you can add to this exercise:

- You can help people build their landscapes one dimension at a time. They can start by arranging the stories on a line, then they can move each story up (like a floating balloon) or down (like a falling stone) where it seems to belong.
- You can present people with one set of dimensions, multiple sets to choose from, or individual dimensions to pair up. If they want to come up with their own dimensions, give them some extra time to make sure they can find the dimensions in your stories.
- You can help people add a third dimension to their landscapes by using different colors of sticky-note dots to denote something low, medium, or high about each story (like risk or hope or cooperation).
- You can ask people to place multiple copies of each story into the space as it might be seen from different perspectives.
- After people have filled up their spaces with stories, you can invite them to tell (real or fictional) stories that range across the space.

Local folk tales

When this exercise is used for story collection, its purpose is to bring out stories that explore wishes and expectations. When it is used for sensemaking, its purpose is to explore wishes and expectations from multiple perspectives. It is especially useful when the people who are making sense of stories are not the people who told them.

Requirements

At least two people; at least 90 minutes.

This exercise also requires your participants to guess at the feelings of the people who told your stories. This might not be possible if the stories you collected are superficial, guarded, distant, or performative, or if they are more opinions than stories. Before you use this

exercise, read through some of your stories and check that they will support the tasks you will be asking people to do with them.

Preparation

Write or print the local-folk-tales diagram (page 69) on poster-sized sheets of paper or full-page online documents, one per small group. Also prepare a few example stories that fit well into a few different locations on the diagram. Don't mention them in your instructions; just have them ready in case people are confused by the exercise.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise. Show people the labeled space.
2-5	You	If you have more than five people, split up into groups of 2-4 people.
1	You	Give each group a deck of story cards and a copy of the diagram.

The main part of the exercise

Minutes	Who	What to do
45+	Small groups	Read the stories, separately or together, silently or aloud. As you read each story, think about how the person who told it would answer these questions about what happened in it. 1. Will things like this happen in the future? 2. *Should* things like this happen in the future? If you can't guess how the storyteller would answer the questions, put the story aside and move on to the next one. Now think about *your own answers* to the questions. Do *you* think things like this will happen in the future? *Should* they? • If your answers are the same as the storyteller's, write the name of the story on a yellow sticky note and place it onto the diagram where it fits best. • If your answers and the storyteller's differ, write the name of the story on two sticky notes, one red (for their answers) and one blue (for yours). Place each sticky note onto the diagram where it fits best. Keep doing this until you have gone through all of the stories.
25+	Small groups	Stand back and look at your space. Do you see any patterns in the colors? Do you see any themes in the different parts of the space? Annotate your space to record what you see.

Finishing up

Minutes	Who	What to do
10+	Everyone together	If you have more than one group, have someone from each group describe what happened in their work together. Then talk about the patterns you see across all of the groups.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

If you are planning your project, and you know you want to use this exercise, you can ask your storytellers the two questions used in this exercise. Then, during your sensemaking workshop, you won't have to ask your participants to guess at what your storytellers meant. They can just look on your story cards to see the answers.

Ground truthing

When this exercise is used for story collection, it helps people think of stories to tell by comparing their experiences to a document or dictionary. When it is used for sensemaking, it uses collected stories to talk about how a document or dictionary could be improved (in theory or in reality).

Requirements

At least three people; at least 90 minutes. A document or set of dictionary definitions that relates to your project's goals.

Preparation

Preparing to use this exercise for sensemaking is the same as it is for story collection (page 71), so I won't repeat the instructions here.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise. Show people the papers on the table (or items on the screen). Ask people not to open the papers/items until you tell them to.
2-5	You	If you have more than three people, split up into groups of 3-4 people.
1	You	Give each group a deck of story cards.

The main part of the exercise

Minutes	Who	What to do
5	Small groups	Look over the papers on the table (or items on the screen). Agree on one paper/item you will explore together. *Do not open it* (or do what it would take to "open" it online).
60+	Small groups	Read the stories, separately or together, silently or aloud. Working together, choose 2-4 stories that seem to connect well to the word(s) on the paper/item you chose. For example, if you chose "Cooperation," you might pick out some stories in which cooperation is abundant or absent. Once you have chosen some stories, talk about your answers to these questions: 1. What *beliefs* do you see in these stories? What do the people in the stories think is true or false? 2. What *values* do you see in these stories? What do the people in the stories seem to care about? What do they like or dislike? Now open the sheet of paper (item on the screen) and read what it says inside. Discuss any connections or gaps you see between the stories you chose, the beliefs and values you see in them, and what it says on the paper (screen). If you have enough time, you can choose more papers/items and go through the process a few more times.
5	Small groups	Talk about all of the papers/items and stories you encountered. What patterns do you see?

Finishing up

Minutes	Who	What to do
10+	Everyone together	If you have more than one group, have someone from each group describe what happened in their work together. Then talk about the patterns you see across all of the groups.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

After each small group has discussed the connections and gaps between the story they chose and the statement they read, you can ask them to rewrite the statement in light of the stories they chose.

Story elements

Story elements are linked symbolic representations that work like superhero teams or locations on a mythical map to encapsulate the feelings, beliefs, and values of the people who built them. With this exercise your participants can derive their own locally-meaningful symbols from the stories you gathered.

That sounds esoteric, but the exercise itself is relatively easy to understand. It relies heavily on clustering, which most people pick up quickly.

Requirements

At least two people; at least two hours.

Also, If most of your stories are stories—that is, they include essential elements of narrative structure such as a setting, characters, plot events (challenges, conflicts, responses), and a resolution—this exercise will will work well. If you gathered mostly opinions, it won't work.

Preparation

Before the workshop, choose a type of story element to use. Which type will work best depends on your project, your participants, and your stories.

The simplest story-element types are easy to think about. Most people will find them easy, but some might find them a bit boring.

Element type	Question	Examples
Situations	What conditions were present in this story?	on the ropes, safe haven, between a rock and a hard place, when it rains it pours, scorched ground, land of plenty
Characters	Who did things in this story?	unscrupulous opportunist, worker bee, innovative mind, heedless thrill-seeker, hero, figurehead, generalist
Values	What mattered to the characters in this story? What did they want or need?	freedom, creativity, calm, adventure, perfection, fairness, stability, challenge, connection

The more complex story-element types are more challenging. Some participants might not want to think that deeply, but some might find the challenge enthralling.

Element type	Question	Examples
Motivations	Why did the characters in this story do what they did?	climbing the ladder, making a name for myself, I did what was asked of me, moral compass, I am the change I want to see, maximizing efficiency
Beliefs	What did people believe in this story?	only the strong will survive, compassion is peril, keep your eyes open, freedom isn't free, a fool and his money are soon parted
Relation-ships	How did the characters in this story relate to each other?	cat and mouse, servant and master, opposites attract, planet and moon, twin souls
Conflicts	Who or what stood in opposition in this story?	arms race, simmering discontent, chest-beating, emotional blackmail, chicken-and-egg problem, vicious circle, lesser of two evils, rock and hard place, endless loop
Transitions	What changes were important in this story?	the busy streets are so quiet, enemies were once friends, remember the good old days, back to the drawing board, a new hope has dawned

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise.
2-5	You	If you have more than five people, split up into groups of 2-4 people.
1	You	Give each group a deck of story cards. Also give each group twice as much space (on its own wall, table, giant piece of paper, or online whiteboard) as you would for a timeline or landscape.

Answering questions and first clustering

Minutes	Who	What to do
1-5	Small groups	Consider the question the facilitator has shown you (or choose one from those they show you).
45+	Small groups	Read each story as a group, silently or aloud. As you read it, write 2-4 brief answers to the question on sticky notes. For example, if the question is "What is going on in this story?" you might write notes that say: • We had an argument • One person listened to another • We found a solution Keep doing this until you have read all of the stories you have. You can keep the sticky notes in one pile. It won't matter which story they came from. You should end up with at least 30 sticky notes in total.
15+	Small groups	Place all of your sticky-note answers onto a table or wall (or screen). Then move the answers around. Put similar answers close together and different answers far apart. Eventually you will arrive at several clusters of answers. Give your clusters names, and write the names on sticky notes.

Writing attributes and second clustering

Minutes	Who	What to do
20+	Small groups	Look at each cluster of answers you have. List 2-4 positive and 2-4 negative attributes of each cluster. For example, say you have a cluster where all of the answers have to do with communication. That's what you called the cluster: Communication. So, what's a good thing about communication? It brings people together. That's a positive attribute. Write that down. Communication also helps people get help. That's another positive attribute. But communication can be deceptive. That's a negative attribute. Write that down too. Do this for all of your clusters.
10+	Small groups	Pick up your attributes and carry (or copy) them to a new, empty space. Ignoring where they came from, cluster them together, placing like with like, just as you did before with your answers. When you have finished, you will have a new set of clusters. Give these new clusters names. Those are your story elements: situations, characters, values, and so on.
10+	Small groups	Look over the story elements you have created. Talk about what they mean.

Finishing up

Minutes	Who	What to do
10+	Everyone together	If you have multiple groups, show each other your story elements. Talk about similarities and differences. If you want to, talk about what would happen if elements from different groups interacted.
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

These are some extras you can add to this exercise. Participants can:

- Build two or three sets of story elements instead of just one (e.g., themes and values).
- Choose some stories that explore and illustrate the meaning behind each story element.
- Compare their story elements to official statements or published frameworks.

- Role-play conversations between characters connected to the story elements.
- Take turns randomly drawing two or three story-element cards out of the set and thinking of remembered or imagined stories to tell.

Composite stories

In a composite stories exercise, groups use collected stories as source material to build a purposeful story, fictional or semi-fictional, which they tell to other groups. As they build and tell stories, people discuss the juxtapositions of meaning created.

This is a high input, high risk, high commitment, high engagement, high output exercise. It does not require any particular types or qualities of collected stories, but it does ask a lot of your participants. Some people will eat this exercise up and ask for more, and some will find it unappealing or even insulting. But when the conditions are right, this can be the most powerful exercise in your toolkit.

Requirements

At least nine people; at least three hours.

Preparation

Choose a story framework—a listing of the parts of a story—that will make sense to your participants. You can also prepare two or three frameworks of varying complexity and ask groups to choose one. These are some of the best known frameworks:

- Aristotle's plot points: Setting, Complication, Resolution
- Freytag's pyramid: Exposition, Inciting incident, Rising action, Climax, Falling action, Resolution, Denouement
- Todorov's narrative theory: State of equilibrium, Disruption of equilibrium, Recognition of disruption, Attempt(s) to repair damage, Establishment of new equilibrium (positive or negative)
- Adams' story spine: Once upon a time, Every day, But one day, Because of that (repeat as desired), Until finally, And ever since then
- Budrys' seven point plot structure: A character, In a context, Has a problem, And tries to solve it, And fails, And tries and fails (repeat as desired), And finally succeeds or fails, And the story ends

I describe these story frameworks (and more) at length in *Working with Stories in Depth*. You can also find them (and more) on the internet or in books about narratology.

Starting out

Minutes	Who	What to do
3	You	Briefly explain what will happen in the exercise. Show the story framework(s).
2	You	Divide participants into *at least three groups* of 3-5 people.
1	You	Give each group a deck of story cards. Also give each group its own wall, table, giant piece of paper, or online whiteboard.

Filling the story template

Minutes	Who	What to do
5	Small groups	Agree on a message you want your composite story to deliver. It should be related to the topic and goals of the project. What do you want your audience to take away from hearing your story? What do you want them to remember?
1-5	Small groups	Look at the framework you have been given (or choose one). Write a sticky note label for each framework slot. Place them on a wall or table or in an online document.
45+	Small groups	Read the stories, separately or together, silently or aloud. Working together, choose some stories that fit well into each slot in your template. Match the characteristics of each slot (what it is about, what it is like) to memorable, meaningful, or relevant moments in the stories. For example: • A story that fits well into an "exposition" slot should explain the way things usually are. • A story that fits well into an "inciting incident" slot should feature a surprising change to the status quo. • A story that fits well into a slot labeled "until finally" should describe the long-awaited resolution of a problem. Select 2-5 stories per slot. Write the story names on sticky notes and place them near your framework labels. If a story doesn't seem to fit any of your template slots, put it aside and move on to the next story.

Building and practicing the story

Minutes	Who	What to do
20+	Small groups	Using your story template and your selected stories, build a fictional story that delivers the message you chose at the start. Think of a character (e.g., a customer) and place them into a context (e.g., walking into your store). Then, drawing from the stories you placed into your template slots, come up with a series of events (e.g., the power goes out) followed by an ending (good or bad: your choice). You can also go back the stories to get more ideas.
15+	Small groups	Choose one person to be the storyteller for the group. They will tell the story to the other groups. Practice telling the story at least once within the group. Keep the story short. It should take no more than seven or eight minutes to tell.

The first telling

Minutes	Who	What to do
15+	Pairs of groups	Storytellers: Visit another group. Tell them your composite story. Everyone else: Listen to the story. Don't interrupt. Afterwards, answer these questions: • What did you take away from this story? • What does it mean to you? • How do you feel about it? Storytellers: Listen to the answers. Take notes if you want to.
15+	Small groups	Storytellers, come back to your group and tell them what the other group said. Then, as a group, talk about what happened. How well did your story deliver your message? See if you can improve the story. Practice telling it again.

The second telling

Minutes	Who	What to do
15+	Pairs of groups	Storytellers, visit the other group, the one you didn't visit before. Tell your improved story. Everyone else, listen, then answer the same questions again.
15+	Small groups	Storytellers, report back on what the other group said. Talk about it. See if you want to make any more tweaks to the story. What could you do to deliver your message even more clearly?

Finishing up

Minutes	Who	What to do
10+	Small groups	Talk about what happened. How did your composite story change from the beginning of the exercise to the end? What did you learn in the process: about the collected stories, your topic, and yourselves?
15+	Everyone together	Talk about all the stories. Talk about patterns that appeared across stories. Were any of the stories similar? Did the stories present different perspectives on the topic?
5	Everyone together	Talk about the exercise: what surprised you, what you learned, what you are curious about.

Notes

Some extra things you can do in this exercise:

- You can give people an array of questions to ask about their stories and ask them to choose the questions they like best.
- You can ask an observer to go along with each storyteller to get a better idea of how people respond to the storytelling. You will need small groups of four people instead of three, but it might make the exercise more productive.
- You can give groups the option of telling their stories or playing them out in role-play conversations.
- You can ask each storyteller to tell their story one more time for the workshop record. Give each group some extra time to discuss whether and how the story should change to be heard outside the workshop.

Exercises with catalytic material

Here's how to use catalytic material in a sensemaking workshop.

1. Ask each group of participants to choose a cluster of observations or interpretations, then a single observation or interpretation, that they would like to explore.
2. Ask each group to select 2-3 subsets of stories they would like to compare in relation to their chosen observation or interpretation. These are usually stories with different answers to one or more questions, like stories about which storytellers said they felt hopeful, hopeless, or indifferent.
3. After groups have selected their story subsets:
   - They can directly compare the subsets, discussing any similarities and differences they see among them.
   - They can use their selected stories in an intermingled sensemaking exercise, using different sticky-note colors to mark which subset each story belongs to.
   - They can break into sub-groups and use their selected stories in parallel, juxtaposed versions of the same sensemaking exercise (whose results they will then compare).

Which method is best for your workshop depends on the scope of your project, the motivation of your participants, the length of your workshop, the strength of your patterns, and how much experience you have had facilitating sensemaking. If you aren't sure what to do, err on the side of simplicity.

Whichever option you choose, place the use of catalytic material after your story contact task, after (or instead of) any non-pattern-focused story exercises (ones that use all of your stories or a sample of them), and before your wrapping-up activity.

A simple contact task with catalytic material

This is the simplest way to help your participants make sense of your catalytic material. Use it if you are inexperienced, your project is small, your time is short, or you have only minimal interest from your participants.

Requirements

At least two people; at least 90 minutes.

Preparation

Prepare one set of catalytic material and one deck of story cards for each small group you expect to have. Prepare to explain how to pull out story subsets (see the tips below).

Starting out

Minutes	Who	What to do
5	You	Introduce the exercise and your catalytic material.
1-10	You	Go over each graph type.
2-5	You	If you have more than five people, split up into groups of 2-4 people.
1	You	Give each group a set of catalytic material and a set of story cards.

Choosing a focus

Minutes	Who	What to do
10	Each person separately	Look over the catalytic material. Choose a cluster of observations or interpretations that seems interesting to you. Within that cluster, choose an observation or interpretation you would like to think about.
5	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Working together, agree on one observation or interpretation to explore.

Pulling out stories

Minutes	Who	What to do
5+	You	Explain how to pull out story subsets.
30+	Small groups	Read the stories in each subset, separately or together, silently or aloud. Pull out 2-3 subsets of stories (adding up to at least 20 stories in total) related to the observation or interpretation you chose to explore.

Making sense of the pattern

Minutes	Who	What to do
10+	Small groups	Talk about the stories in your subsets. What differences do you see between the different groups of stories? Does anything about them surprise you? What do they say to you about the observation or interpretation you chose? If you were to write your own version of the observation or interpretation, what would it say? If you have extra time, choose another observation or interpretation, pull out more subsets of stories, and compare them.
5	Small groups	Decide together what you want to tell everyone else about what you explored and discovered.

Finishing up

Minutes	Who	What to do
15+	Everyone together	Someone (anyone) from each group, explain what you discussed and found out.
5+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

Notes on this option

You can ask each small group, after they have discussed the story subsets they pulled out, to share some related stories from their own experiences with each other.

An intermingled exercise with catalytic material

This is a nested exercise. It embeds an exercise that works directly with stories inside an exercise that works with catalytic observations and interpretations. Use it to help your participants dive deeply into your catalytic materials.

Requirements

At least two people; at least three hours.

Preparation

Choose a sensemaking exercise in which story subsets can be intermingled in one space (e.g., landscape, timeline, local folk tales). Prepare for it as you would normally do.

Prepare one set of catalytic material and one deck of story cards for each small group. Prepare to explain how to pull out story subsets (see the tips below). If you will be working in physical space, bring at least four colors of sticky notes.

Starting out

Minutes	Who	What to do
5	You	Introduce the exercise and your catalytic material.
1-10	You	If you know that people will need some help understanding your graphs, take some time to go over each graph type.
2-5	You	If you have more than five people, split up into groups of 2-4 people.
1	You	Give each group a set of catalytic material and a set of story cards.

Choosing a focus

Minutes	Who	What to do
10	Each person separately	Look over the catalytic material. Choose a cluster of observations or interpretations that seems interesting to you. Within that cluster, choose an observation or interpretation you would like to think about.
5	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Working together, agree on one observation or interpretation to explore.

Pulling out stories

Minutes	Who	What to do
5+	You	Explain how to pull out story subsets.
45+	Small groups	Use your story cards to pull out 2-3 subsets of 20+ stories (each) related to the observation or interpretation you chose. Copy the names of the selected stories onto sticky notes. *Use a different color of sticky note for each subset*. If you want to, each of you, choose a story from one of your subsets that resonates with you. Pair it with a story from your own experience. Read or retell the story you chose to the group, then tell the story you thought of. Write a name for the new story on the same color of sticky note, and circle or underline it to indicate that it is a newly told story.

Doing the embedded exercise

Minutes	Who	What to do
3	You	Introduce your embedded sensemaking exercise.
60+	Small groups	Go through the exercise using the sticky notes you prepared previously. Use your colors to explore patterns among the subsets. If you want to add more new stories that come to mind (and there is time for it), go ahead and do that.
15+	Small groups	Use what you discovered in the story-based exercise to annotate the observation or interpretation to more fully capture the meaning in the stories and in your discussion.

Finishing up

Minutes	Who	What to do
15+	Everyone together	Someone (anyone) from each group, explain what you discovered, discussed, and wrote.
15+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

Notes on this option

Whether you need the pairing task (described here as optional) depends on how many stories you collected. If you have more than 200 stories, you don't need it. If you have 50-200 stories, you can offer it as an option. If you have fewer than 50 stories, don't make it optional; require it (and make 3-person small groups). In that case, groups will need it to find enough stories to explore the observations or interpretations they choose.

A juxtaposed exercise with catalytic material

Like the intermingled exercise, this exercise nests a story-based exercise inside a catalytic-material exercise. Unlike the intermingled exercise, it compares patterns as well as stories.

Requirements

At least eight people; at least 3.5 hours. Note the larger number of people required. This is because each small group will be breaking into two even smaller groups.

Preparation

Choose any story-based sensemaking exercise to embed inside this exercise. Because participants will be keeping their story subsets separated, any exercise will work. Even exercises that don't use spaces (twice-told stories, story elements, story construction) will work. Prepare to facilitate the exercise as you would normally do.

Prepare *two sets of catalytic material and two decks of story cards* for each small group you expect to have. Prepare to explain how to pull out story subsets (see the tips below).

Starting out

Minutes	Who	What to do
5	You	Introduce your catalytic material. Explain where it came from and how it connects to the stories. Then explain briefly what people are about to do.
1-10	You	If you know that people will need some help understanding your graphs, take some time to go over each graph type.
2-5	You	If you have more than five people, split up into groups of 2-4 people.
1	You	Give each group a set of catalytic material and a set of story cards.

Choosing a focus

Minutes	Who	What to do
10	Each person separately	Look over the catalytic material. Choose a cluster of observations or interpretations that seems interesting to you. Within that cluster, choose an observation or interpretation you would like to think about.
5	Small groups	Tell each other which cluster and which observation or interpretation you chose. Say why you think it is interesting. Working together, agree on one observation or interpretation to explore.

Pulling out stories

Minutes	Who	What to do
5+	You	Explain how to pull out story subsets.
45+	Small groups	Use your story cards to pull out 2-3 subsets of 20+ stories (each) related to the observation or interpretation you chose. Copy the names of the selected stories onto sticky notes. *Use a different color of sticky note for each subset*. If you want to, each of you, choose a story from one of your subsets that resonates with you. Pair it with a story from your own experience. Read or retell the story you chose to the group, then tell the story you thought of. Write a name for the new story on the same color of sticky note, and circle or underline it to indicate that it is a newly told story.

Doing the embedded exercise

Minutes	Who	What to do
3	You	Introduce your embedded sensemaking exercise.
60+	Small groups	Go through the exercise using the sticky notes you prepared previously. Use your colors to explore patterns among the subsets. If you want to add more new stories that come to mind (and there is time for it), go ahead and do that.
15+	Small groups	Use what you discovered in the story-based exercise to annotate the observation or interpretation to more fully capture the meaning in the stories and in your discussion.

Finishing up

Minutes	Who	What to do
15+	Everyone together	Someone (anyone) from each group, explain what you discovered, discussed, and wrote.
15+	Everyone together	Talk about what just happened: what surprised you, what you learned, what you are curious about.

Notes on this option

Note the larger number of stories required per subset (30 rather than 20). This is because each story subset has to support its own exercise. Regarding the optional pairing task, the same recommendations apply as for the intermingled option.

Tips on using catalytic material in sensemaking

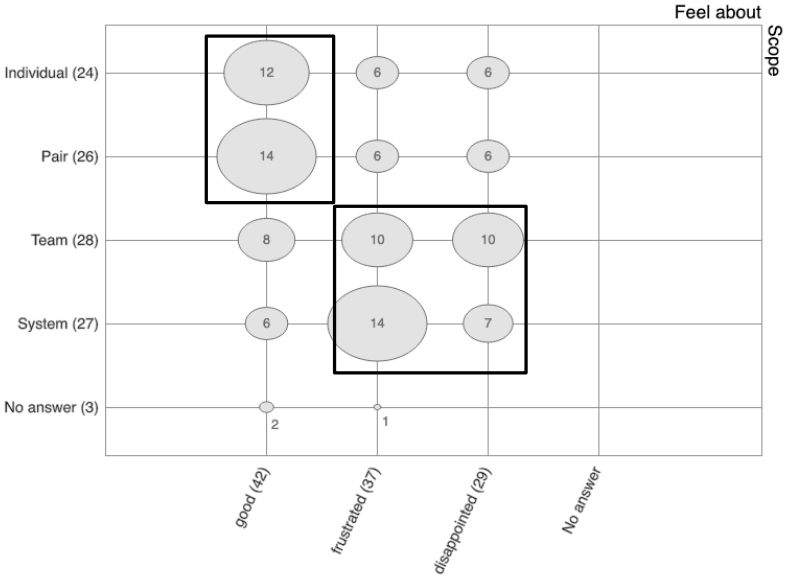
Catalytic material is like the things people use to play a board game: the board, cards, dice, tokens, and other manipulable items. The way you introduce your game pieces can inspire your participants to explore your topic with enthusiasm or intimidate them into turning away in despair. These are some things you can do to make the first outcome more likely.

- Never ask people to use catalytic material on its own, divorced from any stories.
- Never ask people to use catalytic material before they have had direct contact with your stories. Always place a story-contact task first.
- Don’t give out your catalytic material before the workshop begins. Start everyone on the same page.
- Provide at least 20 observations and interpretations for people to choose from so they can pursue their own interests.
- If you think people will be upset, confused, or intimidated by your catalytic material, give them some extra alone time with it. And don’t ask them to just sit and read the material. Give them an active task to do with it (even if one part of the task is done individually).

Helping people draw out story subsets

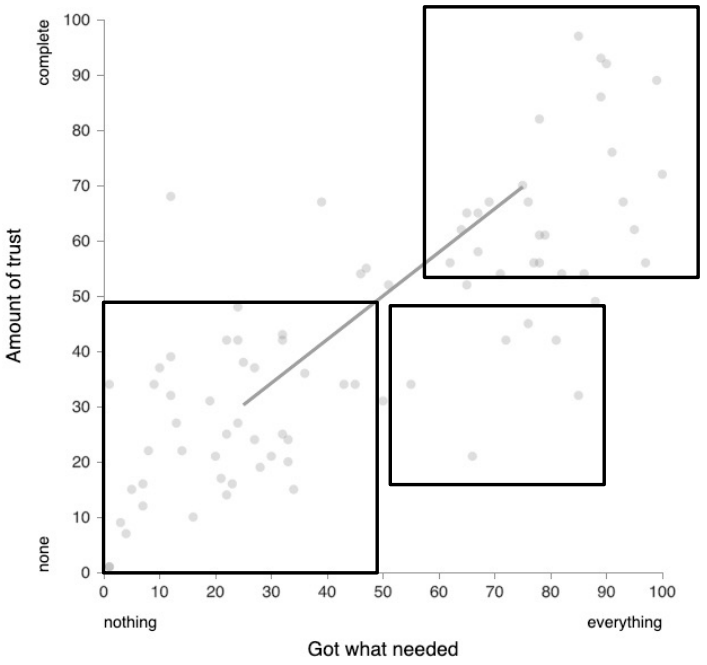
To help your participants pull out story subsets, prepare to show them a few examples like these (but with your own data).

In this pattern, people said they felt better about stories that involved fewer people, so it might be interesting to compare some few-good stories (upper left) with some many-bad stories (lower right).



The following pattern shows a correlation between the amount of trust in a story and whether people got what they needed in it. Here it might be useful to compare three subsets of stories:

- high-trust-good-outcome stories (upper right)
- low-trust-bad-outcome stories (lower left)
- some stories outside the correlation (lower right)



But even with the best of explanations, the time period when people are pulling out story subsets can be a bottleneck.

- If people think they are unqualified to pull out stories, show them that the task is simple and easy, and offer to provide help.
- If people are annoyed by what seems like a tedious task, explain that owning the task gives them the freedom and power to explore the aspects of your collected stories and data that they find most interesting and useful.
- If people seek to avoid the task by doing it sloppily or incompletely, tell them that the more energy they put into the task, the more they will get out of it.

It also helps to explain that groups can split up the task. If a group of four needs to pull out 20 stories, each person only needs to pull out five.

Bootstrapping your sensemaking

Each of the nested exercises above includes a time period in which small groups annotate the observation or interpretation they chose to focus on. You can ask people to record these changes (in speech or writing), and you can use them to improve your catalytic material between workshops. In this way you can create emergent catalytic material that comes together across a series of workshops, becoming more and more representative of the diversity of thought in your community or organization as your project plays out.

Chapter 10

Narrative Intervention

A narrative intervention is an action whose purpose is to change the flow of stories in a team, family, community, organization, or society. In a PNI project, a narrative intervention is typically carried out in response to an unmet need you discovered during sensemaking.

I group narrative interventions into three categories, which are based on three types of unmet needs.

- **Listening interventions**. You discovered that people need to tell more stories, which means that other people need to listen more (or better).
- **Story work interventions**. You discovered that people need to work more on their stories together.
- **Telling interventions**. You discovered that people need to hear more stories, both those you collected and others like them.

I will describe some examples of these three types of intervention, but first I want to explain something important about the intervention phase of PNI.

Intervention is wide open

Intervention is the most flexible and variable phase of PNI. You can plug in many activities, programs, and projects during this time—but you don't have to! Intervention is an optional part of PNI. It does not happen in every project.

Some of the things you can plug in during the Intervention phase are other story-based methods. To be clear, you can connect PNI with other methods in every phase.

In	There are other ways to	Such as
Planning	Plan projects	Gantt charts
Collection	Facilitate story-sharing conversations	Conversation Café
Catalysis	Find patterns	Grounded theory
Sensemaking	Talk about issues	Asset-based Community Development
Return	Preserve stories	Oral history

Still, the intervention phase of PNI is the best place to connect it with other story-based methods. This is because most story-based approaches have intervention at their heart. Some approaches that connect especially well to the intervention phase of PNI are Narrative Therapy, Appreciative Inquiry, and Participatory Theatre.

Listening interventions

In the remainder of this chapter, I will give you a scattering of ideas to explore within each category of needs. I'll describe most of the ideas briefly and some in more detail. Each set of ideas will point you in the direction of even more ideas.

Here are some needs related to listening.

- You found moments of crisis. You need to help people deal with problems before they get out of hand.
  - You could help people form story-sharing groups for mutual support.
  - You could train your customer-facing staff in story elicitation and listening.
  - You could launch a narrative support system (see below).
- You found opportunities for feedback and learning. People have stories to tell that would help you do your work better.
  - You could make story sharing a standard part of your planning process.
  - You could form story-sharing groups that provide input when policies, laws, designs, or plans are being discussed.
  - You could create a narrative suggestion box (see below).
- You found energy for sharing. People are excited about the idea of feeling heard and valued in your community.
  - You could help people learn about story work.
  - You could help people set up local story-sharing groups.
  - You could set up a community story-sharing space (see below).

A narrative support system

A narrative support system is useful when sensemaking reveals that you could do a better job of helping people in moments of crisis. When someone needs help, you might already be asking them for facts, feelings, and opinions. You can also ask for stories, both real and imagined. When someone says "I need help," in addition to (or instead of) asking "What is the problem?" and "What do you need?" you could ask:

- What happened?
- How do you feel about what happened?
- Why do you think that happened?
- What would you like to happen now?
- What do you think would help to make that happen?
- What do you think we could do to help make that happen?

Listening to stories can help you find better solutions, and (with permission) you can share the stories with other people who find themselves in similar situations.

A narrative suggestion box

Narrative suggestion boxes are useful when sensemaking reveals hints of tensions and solutions that flow beneath the surface of a community or organization. If you already have a way for people to make suggestions, perhaps by soliciting opinions or requesting proposals, you can listen more deeply by eliciting stories during the process. Here's an example suggestion-box survey:

- Welcome to the suggestion box. Would you like to tell us about something that:
  - happened (or didn't)?
  - might happen (or might not)?
  - should happen (or should not)?
- What was it that happened, or didn't, or could/not, or should/not?
- This story you told us:
  - How do you feel about it?
  - What does it mean to you? What makes it important to you?
  - How does the story connect to you or to someone you know?
  - Who would you like to hear this story? If you were talking to them right now, what would you say to them about it?
  - Is there anything else you want to tell us about the story you told? Maybe something else that happened (or didn't), might happen (or might not), or should happen (or should not)?
- Would you like to talk to someone about this? If so, contact ___ at ___.

A story-sharing space

A story-sharing space is useful when sensemaking reveals a need to connect with other people in the community or organization. A permanent place for story sharing gives people

the permission and tools they need to share stories of their experiences, experience the stories of other people, and connect their stories to the stories of other people.

You can use everything you learned in this book about supporting story sharing to design and support a permanent story-sharing space that encourages responsibility (not judgement), accountability (not competition), curiosity (not interrogation), and exploration (not categorization). Some examples might be:

- A bench in a town park engraved with story-eliciting questions and story-sharing tips
- A "read a story tell a story" box in a café (like a "tiny library" but for story exchange)
- A corner of a room in a school, library, cafeteria, or community center with story cards and instructions for adding to the collection
- An online forum with a "this just happened" thread

Story work interventions

Here are some needs related to story work—that is, making sense of stories, getting them to where they need to go, and changing how they flow.

- Your project was a great success, but too few people were involved. You need to expand your effort and make it more inclusive and longer-lasting.
  - You could make your project a yearly event, drawing in more people and becoming more ambitious every year.
  - You could create a series of new projects to explore sub-topics that came up during the project.
  - You could set up an ongoing sensemaking space (see below).
  - You could set up a narrative mentoring program (see below).
- Your project helped you begin to explore some important needs, but it didn't go far enough. You need to go deeper into the needs to address them fully.
  - If you found a need to process emotional or traumatic issues, you could try Narrative Therapy.
  - If you found a fixation on what is broken and a blindness to solutions in plain sight, you could try Appreciative Inquiry.
  - If you found a need to get along better, you could try Restorative Practices.
- Your project was informative, but you didn't get as many new ideas as you had hoped for. You need another way to bring your collective imagination to bear.
  - If you found a need to challenge or rethink the way you work or live together, you could try Participatory Theatre.
  - If you found a need to plan for the future, you could try Scenario Planning.
  - If you found a need to change the way you spend money, you could try Participatory Budgeting.

These are just a few ideas, but there are literally hundreds of other group-work approaches you can connect to the Intervention phase of PNI. Or, if you like, PNI can act as a ground-truthing pilot for hundreds of other group-work approaches.

A space for sensemaking

An ongoing sensemaking space is useful when sensemaking reveals a need for more sensemaking. If you have a physical or online place you can set aside (and watch over), you can invite people in your community or organization (individuals and small groups) to make sense of your stories on an ongoing basis.

A sensemaking space like this can help the members of your community or organization:

- keep the conversation going
- involve more people
- deal with new issues
- orient newcomers
- help people learn about story work

In your space, help people:

- Read or listen to the stories you have collected
- Make sense of the stories, individually or in groups, by:
  - looking for patterns
  - doing simple tasks—pairing, sorting, arranging, clustering
  - doing sensemaking exercises, with instructions
  - annotating and commenting
- Add more stories to the collection, individually or in groups, by:
  - responding to questions or stories
  - using exercise instructions, peer interview scripts, or surveys
- Seek help as they work with stories, go through exercises, and add to the collection

Online, you can accomplish the same thing using a website with forums, a wiki, and access to online meeting software with screen sharing and breakout rooms.

A narrative mentoring program

Narrative mentoring is like regular mentoring—pairing people with much and little experience—but with extra instruction and support for sharing and working with stories. This is useful when sensemaking reveals a need for the passing on of wisdom. You can provide:

- **Encouragement**. Mention the value of story sharing during your mentorship signup process. Explain how story sharing works: where it comes from, why we do it, how it helps us. Explain how it can help mentors frame essential advice and help mentees explain roadblocks and celebrate achievements. Gather and distribute testimonials about the value of story sharing in mentorship.
- **Materials**. Give your mentors and mentees a library of suggestions, agreements, questions (story-eliciting and follow-up), interview scripts, exercise instructions, and answers to frequently asked questions they can use to build their story-sharing practice.

- **Support**. Make yourself available to answer questions, help one person convince the other to try sharing stories, conduct a group interview, facilitate an exercise, or help a mentor-mentee pair find another pair who can help them get started with story sharing.

Telling interventions

Here are some needs related to storytelling.

- You found that people have more stories to tell to each other.
  - You could post some of the stories you collected in your community center, so people who did not participate in the project can benefit from it.
  - You could create a "day in the life" series that helps community members understand each other better.
  - You could create a narrative orientation to help newcomers better understand your community (see below).
- You found that people have more stories to tell to those who make the decisions.
  - You could improve your town hall format to include times for sharing stories as well as expressing opinions.
  - You could help your community members craft multimedia stories with Digital Storytelling.
  - You could take a dramatic action that changes the stories people tell about your community or organization (see below).
- You found that people have more stories to tell to those who are learning.
  - You could create a narrative learning resource in which stories are mixed with how-to information.
  - You could create an expert system using Case-Based Reasoning.
  - You could create a narrative simulation (see below).

A narrative orientation

A narrative orientation is useful when sensemaking reveals a need to help newcomers understand your community or organization better: its history, culture, and unwritten rules. Working with the stories you have collected, you can create a story-based experience that will welcome newcomers and help them learn how to fit in and contribute. You can ask your participants in your sensemaking workshops, or in special task-force workshops, to help you find the best stories to pass on to new members. Ask them to look for stories that connect to these essential aspects of community:

- Identity: who we are; where we come from; what matters to us
- Purpose: what we do; why we do it; how it works; where it's strong; where it's weak
- Norms: how we work and live together; what we do and don't do; what happens when we break the rules
- Conflicts: where we agree and disagree; how we look for common ground; how we get along when we disagree

- Aspirations: where we want to be; what we are doing to get there; the obstacles that lie in our way

A dramatic action

Sometimes PNI projects uncover needs that are too deep to be addressed by any amount of talking. Only action will make a difference.

You can change the stories people tell in your community or organization by carrying out a dramatic action based on values. Because people are always looking for stories to share, good and bad, stories naturally gather around such actions. If the actions are based on values that are important to the community or organization, stories will be told about them. And if they are not, stories will be told about that.

Dramatic actions based on values are	And are not
Done to meet needs	Done to *seem* to meet needs
Honest	Manipulative
Authentic	Fake
Transformational	Surface-level
Relevant	Irrelevant
Transparent	Opaque
Useful	Useless

You can gather ideas for dramatic action in your sensemaking workshops. Ask your participants what sorts of actions would change the stories people tell about the topic you are exploring.

A narrative simulation

Building a narrative simulation is useful when your sensemaking has uncovered a dangerous excess of confidence around certain skills. When people think they know how to do something and don't, in a way that creates danger for themselves and others, a narrative simulation can help.

To build a narrative simulation, first choose an overall skill you want to help people learn, like "Putting safety first" or "Mastering time management." Make sure the skill is well represented in the stories you collected in your project.

Next, invite some people who know a little and a lot about the skill to a simulation building workshop. You will need at least nine participants for at least four hours. Prepare to record the workshop so you can capture any new stories people tell.

Starting out

Minutes	Who	What to do
3-5	You	Introduce the stories and the overall skill you want to support.
2-5	You	Create groups of 3-5 people. Give each group a set of story cards. If you can, create small groups with varying levels of experience with respect to the overall skill you chose. One way to do this is to ask people to sort themselves into three groups with low, medium, and high experience with the skill, then ask them to form groups with one person from each experience-level group.

Pulling out stories

Minutes	Who	What to do
30+	Small groups	Read the stories, together or separately, quietly or aloud. Choose 30+ stories that speak to the heart of the overall skill. If you think of any experiences of your own that connect to the stories you are reading, go ahead and tell them. Write the names of the stories you chose (old and new) on sticky notes.

Finding and clustering skills

Minutes	Who	What to do
20+	Small groups	For each story you chose, list 2-4 *detailed* skills that made a difference in the story—by being present *or* absent. For example, someone might have: • asked a clarifying question (or didn't) • built a contingency plan for a likely time crunch (or didn't) • verified that a machine was switched off before touching a belt (or didn't) • half-solved a problem (or didn't) Write the skills on a different sticky-note color than you used for the story names.
10+	Small groups	Now set aside your stories and cluster the skills you wrote down. Place like with like until you have 5-10 skill clusters. Give the clusters names.

Writing scenarios

Minutes	Who	What to do
5	Small groups	Decide which skill cluster is most important to you.
20+	Small groups	Go back to your previously selected stories and choose 10+ stories that exemplify the presence or absence of that skill cluster especially well. If any more stories from your own experience come to mind while you are doing this (as especially good examples in relation to the skill cluster), tell them, give them names, write their names on sticky notes, and add them to your selected stories.

30+	Small groups	Using the 10+ stories you chose (and/or told), build a fictional scenario that has this structure:
		
		• You are in this *situation*
		• This *challenge* arises
		• You have this *choice* to make
		  – You do this in *response*, and this good *outcome* happens as a result
		  – You do this in *response*, and this neutral or intermediate *outcome* happens
		  – You do this in *response*, and this bad *outcome* happens
		
		Write each of these nine scenario elements on a separate sticky note. *Mix up the order of the response-outcome pairs* so it's not obvious which is best. Hide each outcome under its response.
		
		Write using the second person and the present tense: *you have a big meeting today*, *you get up late*, *you go over your presentation one more time*, and so on.
		
		If you have extra time, choose another skill cluster and build another scenario.

Testing and refining

Minutes	Who	What to do
20+	Small groups	One person from each small group: visit another group, show them your simulation, and watch them play it. Everyone else: play the simulation. Playing a simulation means: • Reading the situation, challenge, and choice • Choosing one of the three responses • Revealing the outcome under the response (by picking it up or moving it) • Reading and reacting to the outcome • (Optionally) Choosing one or two more responses; revealing the outcome(s); talking about it
10+	Small groups	Presenters: return to your group and tell them how the simulation worked. Everyone: talk about what you could do to improve it. Improve it as much as you want to.
20+	Small groups	One person from each small group (the same person, or a different one): visit the group that has not yet seen your simulation. Show it to them and watch them play it.
10+	Small groups	One last time, talk about how the simulation worked and what you could do to improve it.
10+	Small groups	Prepare the simulation for use outside the workshop. You might want to choose a few of your selected (or newly told) stories to illustrate each response/outcome pairing.

Finishing up

Minutes	Who	What to do
20+	Everyone together	Talk about what just happened. Talk about how people can stay involved as you prepare the simulation for wider use.
10	You	Capture the scenarios people built and the stories they used to build them.

After the workshop

When your full set of narrative scenarios is ready, use them to create a learning experience. Then test it by watching people use it and talking to them about it. You can also give people the opportunity to tell a story about their experience playing the simulation and to read stories left behind by other people who played it.

Chapter 11

Narrative Return

The return phase of PNI is a lot like follow-through in tennis. Even though your racket is no longer touching the ball, so to speak, you need to keep your eye on what is happening as the project comes to a close.

In tennis, attention to follow-through impacts a player's game in two ways:

1. Follow-through creates a positive backflow effect on the entire swing. If you plan—or even expect—to pull back your arm after you hit the tennis ball, you will hit the ball differently than you would if you planned to act as if you were still in contact with it.
2. Follow-through protects the player's health. Abruptly stopping the arm's motion can injure the arm's muscles, tendons, and ligaments, especially if it's done hundreds of times a day.

Attention to the return phase of a PNI project has remarkably similar impacts:

1. Supporting the return phase creates a positive backflow effect on your entire project. If you plan—or even expect—to pull back from engagement with your participants the moment your sensemaking phase ends, you will carry out your project differently than you would if you planned to act as if you were still in contact with them in the weeks afterwards. For example, during your planning process, if you think about how you will return the stories you collect to your community, you can tell your participants about your plans, and this will increase their interest in the project.
2. Supporting the return phase makes your project less likely to injure (and more likely to improve) the narrative health of your community or organization. An abrupt withdrawal of participation can injure the precious trust you have built, reducing the chance that people will participate in future projects.

What happens during the return phase of a PNI project?

1. Just after they have participated in a sensemaking workshop, your participants may need to get some distance from the project. They might need some time to process what happened, and they may not respond to your initial inquiries for feedback or final thoughts. Leave them alone for a while.

2. When your participants are ready to engage with your project again, they will want to know if you are keeping the promises you made. They will expect to be informed—and to have the opportunity to participate—as the project winds down. Keep your promises by informing and including them.
3. Eventually, your participants will begin to reflect on the project and their part in it. It will become a story for them, a story they incorporate into the larger story of their lives and careers. Help them do this by listening to them and answering their questions.
4. Finally, some participants may express a wish to continue the conversation. When you hear them reminiscing about the project and wishing they could repeat some aspects of it (being heard, learning together, finding new energy and ideas), ask them about future projects they would like to see happen.

Supporting return for your community

During your project, you asked people to do things: tell stories, read stories, talk about stories. In the return phase, people will ask you to do things. Prepare to respond to requests, either as they come up or in anticipation.

People might say	You can respond
I would like to stay informed about the project going forward.	Here is a sign-up list to be notified of upcoming project events. We will also send you our final project report when it's ready.
If you want any feedback on the project, I can help. I know a lot about the topic.	Thank you! We would be glad to hear from you. You can fill out this survey or contact us to set up an interview.
I'm not happy with how the project went. Where can I complain?	We are eager to hear anything you have to say about the project. When can you talk to us?
I liked reading the stories. Are there any more?	You can access all of the stories we collected here.
I am interested in this topic. I would like to explore the stories and other information you collected. All of it, if possible.	That's great! Here is an archive of the entire project: our planning documents, our stories, our catalytic material, our workshop records. We would be glad to answer any questions you have about any of it.
If you do any more projects like this, I would love to get involved. How can I help?	We are putting together a steering committee and helper group for our next project. If you are interested, give us your contact information and we'll call you.

People might say	You can respond
The sensemaking workshop was excellent, but it ended too soon. How can I do more?	These are some exercise instructions you can use. Why not recruit some friends or colleagues and do some sensemaking of your own? If you want us to include what you do in the project, talk to us.
This was great! I want to keep the conversation going. Is there some kind of story-sharing space I can join?	Yes, we set one up in the project. Here's how you can join it. (Or, here are some ideas for setting up a story-sharing space. We would be happy to talk about them with you.)
I want to do projects like this myself. How do you do this work?	We would be glad to answer your questions about how we carried out the project. Also, here is some information about participatory narrative inquiry.

Supporting return for your sponsors

PNI projects often have sponsors of some kind, either people who provided financial support or people who got to say whether the project could happen. In the return phase, you must prepare to prove the value of the project to its sponsors. Even if that's you, it is still a good idea to convince yourself that the project had value.

They might say	You can respond
So what did you actually do in this project?	In a series of ___ and ___, we gathered ___ stories about ___ from ___ people, and in ___ sensemaking workshops, ___ people made sense of the stories together. This is our final project report. It tells the story of the project from start to finish.
What kinds of stories did you get? What are some of the best stories?	These are the stories our participants told us were especially meaningful and relevant to them, and these are all of the stories we collected.
What conclusions did you draw? What are your findings?	This is what happened in our sensemaking workshops, and these are the things our participants said and built. (For example: people built these three timelines, each of which covered our history from a different perspective.)
What was the outcome of the project? What are your recommendations?	Near the end of our sensemaking workshops, we asked our participants to list their discoveries, surprises, and ideas. These are the lists they built.

They might say	You can respond
What about the data? What are the trends? Can we see them?	These are the patterns our participants chose to work with in our sensemaking workshops, and this is what happened when they did. If you would like to participate in the project, we can facilitate a special sensemaking workshop just for you. We'd love to include your perspectives.
Did the project succeed? Was it worth doing?	Here are some of the things our project participants said about the project and its impact for them. Here are some of the things we learned as we carried it out.
Can I just see everything?	Absolutely. Here is an archive of our entire project.

Supporting return for your PNI practice

Supporting return for your own PNI practice is the easiest and most dangerous part of PNI to ignore. To succeed with PNI, you need to make sense of what happened in your project so you can do an even better job the next time.

You might say	You can respond
We did it! It was hard, and we made plenty of mistakes. But we did it.	Let's celebrate! Sure, things might not have gone exactly the way we wanted them to, but we did pretty well.
What *really* happened in our project? What was it like for our participants? Are there any perspectives on the project we have not heard?	Let's ask our participants about the project. Let's ask what surprised them, what mattered to them, what they were grateful for, and what they wish had happened. And let's ask some people who weren't involved in the project. What would they say about it?
What did we learn about our community or organization?	Let's have an after-party for the whole project. We'll talk about the moments we remember and the things we heard, and we'll talk about what all of it means about our community or organization.

You might say	You can respond
What did we learn about our strengths and weaknesses?	During the after-party, let's talk about what parts of the project went better and worse than we expected. And let's talk about our skill sets and what we can do to make the hardest parts easier.
How can we use what we learned to improve our PNI practice?	Let's pretend-plan our next project. What do we want to keep the same? What do we want to do differently?
(Years later) What did we do in this project?	Great, we made an archive of the entire project.